



Canadian Export Reporting System (CERS)

Portal User Guide

Version: 1.3

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Introduction

The Canadian Export Reporting System (CERS) is a web-based, self-service portal that enables exporters and customs service providers to create and submit electronic export declarations and summary reports to the Canada Border Services Agency (CBSA).

The following material provides instruction for using the CERS Portal.



Help and Support

- Refer to [Electronic Commerce Client Requirements Document \(ECCRD\) - Chapter 25](#) for additional information regarding the CERS Portal
- Technical e-mail enquiries should be sent to the **Technical Commercial Client Unit (TCCU)** at tccu-ustcc@cbsa-asfc.gc.ca or by phone at 1-888-957-7224 (option 2)
- Registration related enquiries should be sent to the **Commercial Registration Unit** at CBSA.Export_Program-Programme_Exportation.ASFC@cbsa-asfc.gc.ca
- General e-mail enquiries can be sent to CBSA.CERS_Inquiries-Renseignements_SCDE.ASFC@cbsa-asfc.gc.ca



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1. Creating a CERS Business Account

To create a new CERS Business Account:

- 1) Access the CBSA web portal
- 2) Create a new CERS User Account
- 3) Obtain an account activation code from the CBSA
- 4) Log into the CERS Portal and access the Business Accounts section
- 5) Use the activation code to activate a CERS Business Account



Step 1: Access the CBSA Web Portal

The CBSA web site will contain a **Log In** page for the CERS Portal. You can use either a SecureKey Concierge **Sign-In Partner** or a Government of Canada - Online Service account (**GC Key**) to access the CBSA web portal.

CERS Portal

Log In

The CERS Portal is a secure data transmission option developed by the Canada Border Services Agency (CBSA) that allows the trade community to complete electronic export trade document submissions through the Internet.

Important: If you are using a shared computer, make sure to log out once you have completed your session so that no protected data is accessible to other users.

To access your CERS Portal Account you need to log in using one of two methods:

1. Log in with a Sign-In Partner

This option allows you to log in with a User ID and password that you may already have, such as for online banking.

Note: When choosing this option, you will be temporarily leaving the CBSA website.

Sign-In Partner Log In

2. Log in with GCKey

This option allows you to log in using a Government of Canada User ID and password.

GCKey Log In

Related links

[About the CERS Portal](#)

[Apply for a Shared Secret](#)

[CERS Portal Terms and Conditions](#)

[Frequently Asked Questions \(FAQs\)](#)



Step 1: Access the CBSA Web Portal

Log In Option 1:

Use a SecureKey Concierge **Sign-In Partner** to access the CBSA web portal

SECURE KEY *Service de Concierge*
L'accès en ligne simplifié

Veillez sélectionner la langue

SecureKey Service de Concierge vous permet d'accéder aux services gouvernementaux par l'intermédiaire d'un « partenaire de connexion », tel que votre banque en ligne ou l'émetteur de votre carte de crédit. Aucun mot de passe ni autre renseignement personnel n'est divulgué au gouvernement du Canada ou à SecureKey Service de Concierge. De même, le nom du ministère n'est pas communiqué au partenaire de connexion.

Français

Annuler

SECURE KEY *Concierge*
Online Access Made Easy

Please select language

SecureKey Concierge lets you access government services by using a "Sign-In Partner" such as your online bank or credit card issuer. No passwords or other personal information are disclosed to the Government of Canada or SecureKey Concierge. The government department name is not disclosed to the Sign-In Partner.

English

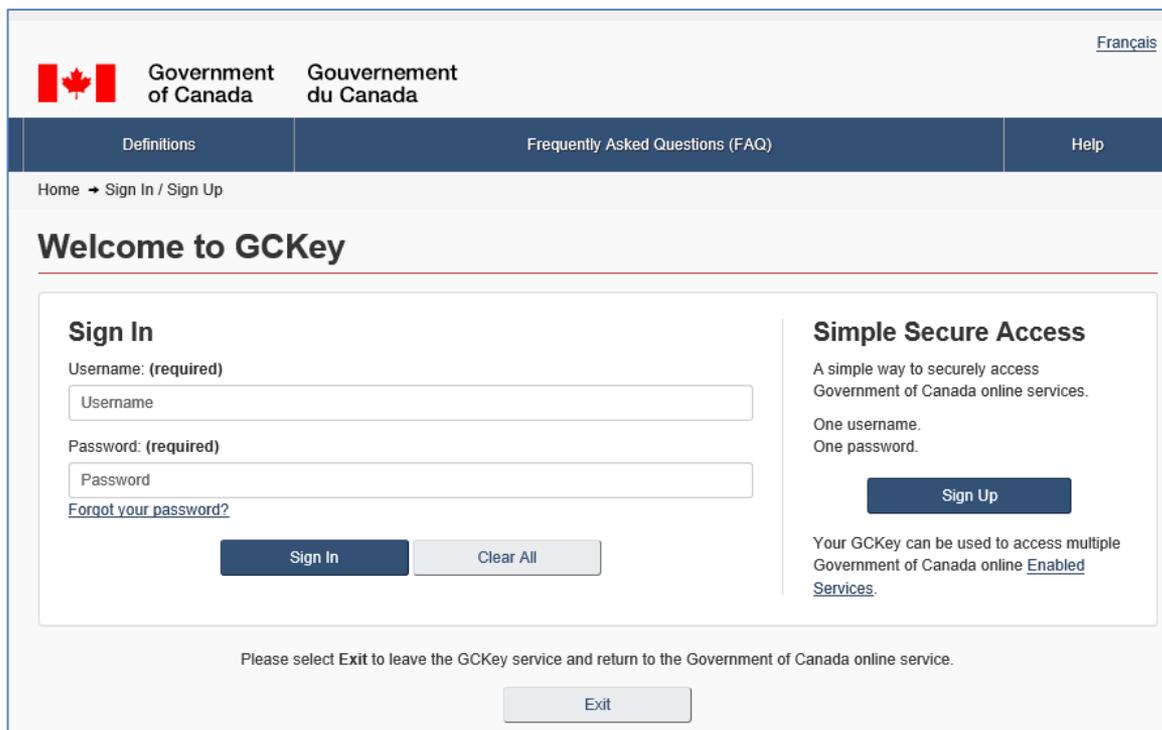
Cancel

Step 1: Access the CBSA Web Portal

Log In Option 2:

Use your Government of Canada (GC) Key to log into the CBSA Web Portal

- To **sign in**, enter the username and password associated with your GCKey account
- **NOTE:** New users can click the **Sign Up** button and complete an online registration process to obtain a GC Key



The screenshot shows the GCKey login interface. At the top, there is a header with the Government of Canada logo and the text "Government of Canada" and "Gouvernement du Canada". A language selector for "Français" is in the top right. Below the header is a navigation bar with "Definitions", "Frequently Asked Questions (FAQ)", and "Help". The main content area starts with a breadcrumb "Home → Sign In / Sign Up" and a heading "Welcome to GCKey". The "Sign In" section contains a "Username: (required)" field with an input box, a "Password: (required)" field with an input box, and a "Forgot your password?" link. There are "Sign In" and "Clear All" buttons. To the right, the "Simple Secure Access" section explains that users need one username and one password, and provides a "Sign Up" button. Below this, it states that the GCKey can be used to access multiple Government of Canada online [Enabled Services](#). At the bottom, there is an "Exit" button and a note: "Please select Exit to leave the GCKey service and return to the Government of Canada online service."



GC Key: Sign Up Process

To **sign up** and obtain a GC Key, you will need to supply the following information:

1) Enter a unique **username**

Home → GCKey Sign Up Step 2 of 4

Terms and Conditions | **Username** | Password | Questions and Answers

Create Your Username

Your Username must contain between eight and sixteen characters, no special characters (for example: %, #, @) and may contain up to seven digits. When creating your Username, we recommend that you:

- make your Username easy for you to remember and hard for others to guess;
- avoid using personal information such as your name, Social Insurance Number (SIN), mailing address or email address;
- always keep your Username secure and do not share it with anyone.

Create Your Username: **(required)**

Please select **Continue** to proceed or click **Cancel** to end the Sign Up process.

Continue | Clear All | Cancel

Privacy

Please keep your Username secure. For more information on how your privacy is protected, please refer to our [Personal Information Collection Statement](#).

Username Checklist

- ✓ 8-16 Characters
- ✓ No Special Character(s)
- ✓ No more than 7 digits



GC Key: Sign Up Process

To **sign up** and obtain a GC Key, you will need to supply the following information:

2) Enter an account **password**

Terms and Conditions Username **Password** Questions and Answers

Create Your Password

Your Password must be between eight and sixteen characters, contain at least one upper case letter, one lower case letter and one digit, and must not contain 3 or more consecutive characters from your Username.

Create Your Password: **(required)**

Confirm Your Password: **(required)**

Please select **Continue** to proceed or click **Cancel** to end the Sign Up process.

Privacy

Please keep your Password secure. For more information on how your privacy is protected, please refer to our [Personal Information Collection Statement](#).

Password Checklist

- ✓ 8-16 Characters
- ✓ Does not contain 3 consecutive characters from Username
- ✓ Valid characters
- ✓ Lower case letter(s)
- ✓ Upper case letter(s)
- ✓ Digit(s)
- ✓ Passwords match



GC Key: Sign Up Process

To **sign up** and obtain a GC Key, you will need to supply the following information:

3. Enter information you could use to recover a forgotten **password**

Create Your Recovery Questions, Answers and Hints

Your Recovery Question, Answers and Hints are used to help you if you forget your Password. Please complete all the required fields below to continue the Sign Up process.

Select a Recovery Question: **(required)**

What was my favourite subject in school?

My Recovery Answer: **(required)**

My Memorable Person: **(required)**

My Memorable Person Hint:

My Memorable Date (YYYY-MM-DD): **(required)**

My Memorable Date Hint:

Please select **Continue** to proceed or click **Cancel** to end the Sign Up process.

Privacy

Please keep your Recovery Question, Answers and Hints secure. For more information on how your privacy is protected, please refer to our [Personal Information Collection Statement](#).

i

Your answers must contain at least three characters and contain no special characters (for example: %, #, @). Your hints must contain at least three characters and may contain letters, numbers and the following punctuation characters: apostrophe ('), comma (,), dash (-), period (.) and question mark (?).

Note: Your GCKey will be issued after completing this step.



Step 2: Create a New CERS User Account

Within the CBSA web portal, create a new CERS User Account by entering your profile information.

Government of Canada / Gouvernement du Canada

CBSA Portal

Home

Welcome to CERS Portal

Before accessing the CERS Portal, you must create a User Account or tra

Option 1

To create a new User Account, select the **Create New User Acco** button below.

[Create User Account](#)

CBSA Portal

Canada

Home > Create User Account

Create User Account

Enter Profile Information

All fields are mandatory unless otherwise specified.

Note: Selecting a ? icon displays related help information in a new browser window.

First Name:

Last Name:

Email Address:

Re-type Email Address:

Telephone Number:

Telephone Extension (optional):

Preferred Time Zone: -- Select Time Zone -- ?

Preferred Language of Correspondence: English French ?



Step 3: Create a New CERS User Account

You will be issued a unique User Reference Number (**URN**) for your new CERS User Account. This URN will be displayed at the top-right corner of the screen when you log into the CBSA Portal.

Note: For Account Users and/or Account Browsers, this URN needs to be shared with an Account Owner or Proxy Account Owner in order to be granted access to an existing CERS Portal Business Account.

CBSA Portal  Canada

Home > User Account Created John Smith MO516723

User Account Created

Your CBSA Portal User Account has been created and your profile information has been saved. An email has been sent to the address you provided to confirm your registration.

User Reference Number(URN): **MO516723**

Creation Date/Time: **2019-08-30 16:12:54**

Please note that your URN is a unique number that is associated with your User Account. You should share your URN, family name and email address with other CERS Portal users so that they may grant you access to their Business Account(s).

Note: An  icon next to a link or button indicates that when that link or button is selected the information will be displayed in a new browser window.

[Print/Download User Account Information](#) ( PDF 33KB)

If you have any questions regarding your User Account or URN please review the [CERS Portal Help and Support](#) ( page).

[Continue >](#)

Preferred Time Zone: Eastern



Step 4: Obtain an Activation Code from the CBSA

Activation Process for Existing CAED Accounts

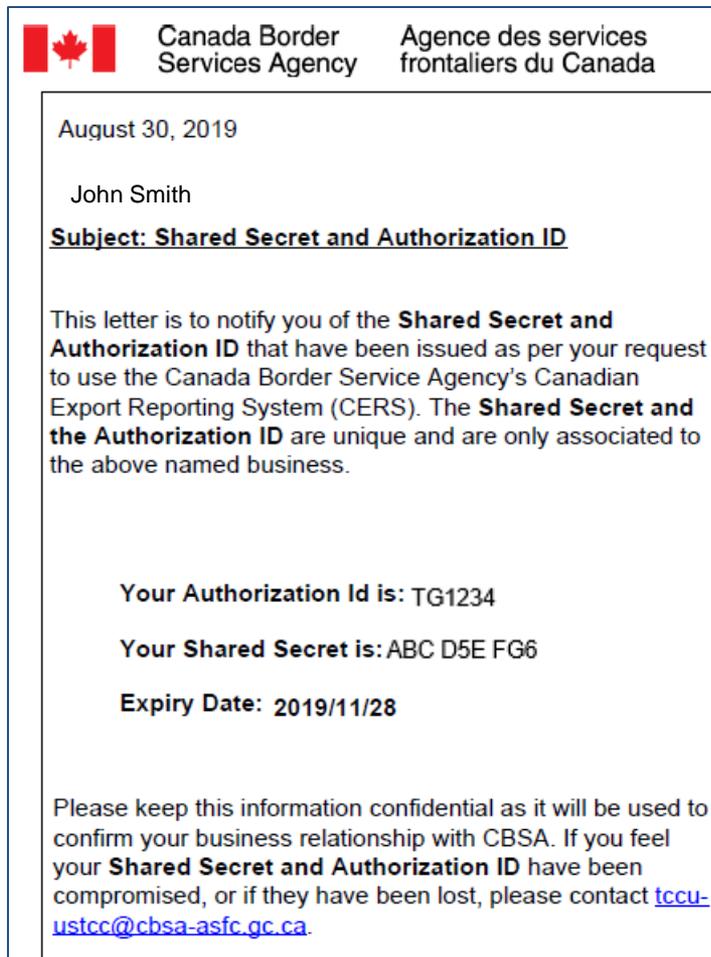
- The CBSA has been working with Statistics Canada (SC) to transfer existing Canadian Automated Export Declaration (CAED) accounts and Summary Reporting Program (SRP) accounts to the CERS Portal. If your company has completed either a valid CAED export declaration submission or a valid SRP report submission between December 1, 2017 and December 1, 2019, your CAED account will automatically be transferred to the CERS Portal. The CBSA will mail your company a CERS Portal registration letter containing an activation code prior to your designated onboarding wave.
- Refer to <https://www.cbsa-asfc.gc.ca/prog/cers-scde/menu-eng.html> for further information regarding the pilot and onboarding events for CERS Portal.



Step 4: Obtain an Activation Code from the CBSA

Activation Process for New Exporters

- If your company has not used the CAED software to complete a valid export declaration submission between December 1, 2017 and December 1, 2019, then it can complete a standard registration process to obtain a “Shared Secret” (i.e. activation code) for a new CERS Portal Business Account.





Step 4: Obtain an Activation Code from the CBSA

Activation Process for New Exporters

Note that in order to register for a new CERS Portal Business Account, your company must possess an active **Exporter Business Number**:

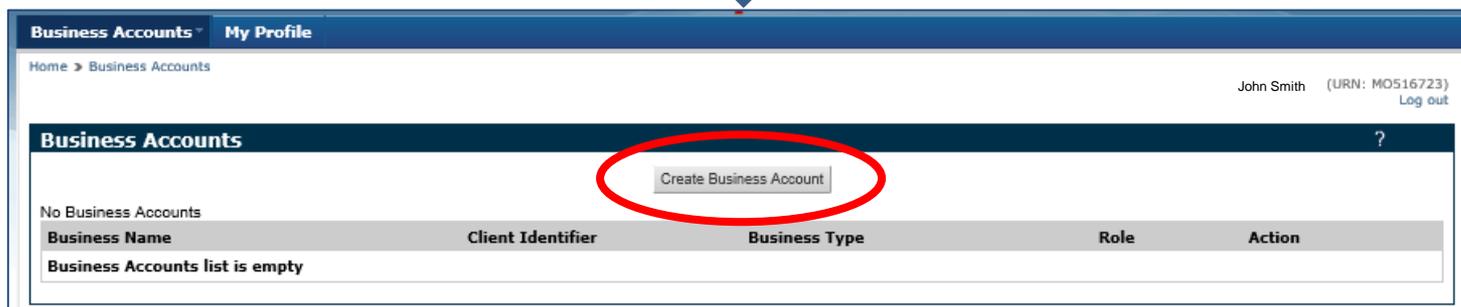
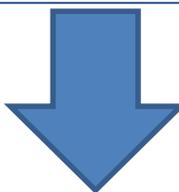
- The Exporter Business Number consists of a 9-digit Business Number combined with an RM program account (Example: **123456789RM0001**). Both items are issued by the Canada Revenue Agency (CRA).
- The RM program account needs to be configured to support **exporter** reporting usage.

Clients may contact the CRA Business enquiries line (1-800-959-5525) to obtain a new Exporter Business Number or update an existing RM program account.



2. Activate the CERS Business Account

Log into the CBSA Portal. Access the **Business Accounts** section then click the “*Create Business Account*” button.





Activating the CERS Business Account

Complete the online activation process:

i. Enter your company's Exporter Business Number.

The screenshot shows the CBSA Portal interface. At the top, there is a blue header with the text 'CBSA Portal' and a red maple leaf logo. Below the header, there are navigation tabs for 'Business Accounts' and 'My Profile'. The main content area is titled 'Create Business Account - Step 1 of 3' and contains the following text: 'Enter Business Information', 'If you are the authorized representative of a business you may begin the process of creating a Business Account by providing the information below.', and 'All fields are mandatory.' There is a single input field labeled 'Business Number:' with a help icon to its right. At the bottom right of the form, there are 'Submit' and 'Cancel' buttons.

ii. Enter the **activation code** that has been issued by the CBSA.

The screenshot shows the CBSA Portal interface for the second step of the activation process, titled 'Create Business Account - Step 2 of 3'. The main content area contains the text: 'Enter Shared Secret', 'If you are the authorized representative of a business you may begin the process of creating a Business Account by providing the information below.', and 'All fields are mandatory.' Below this, there are two pre-filled fields: 'Business Number: 123456789RM0001' and 'Business Type: Exporter'. There is a 'Shared Secret:' label followed by three empty input boxes and a help icon. At the bottom right of the form, there are 'Submit' and 'Cancel' buttons.



Activating the CERS Business Account

iii. Supply your contact information

Note: The CERS Portal User who activates the CERS Business Account will be designated as the “**Account Owner**” and will have full control over the Business Account (e.g. Add/remove users; Delete Business Account).

Create Business Account - Step 3 of 3

Enter Account Owner Information

All fields are mandatory unless otherwise specified.

First Name: John
Last Name: Smith

Account Owner Information

Position Title

Email Address

Re-type Email Address

Telephone Number

Telephone Extension (optional)

Fax Number (optional)

Address

City

Country
-- Select Country --

Province/State (Canada/USA locations only)
-- Select Province/State --

Postal/Zip Code



Activating the CERS Business Account

The CERS Portal User activating the CERS Business Account will be able to continue to Create Another Business Account, should it be necessary. The same rule applies with any additional Business account the user creates, they will have full control over the Business Account (e.g. Add/remove users; Delete Business Account).

Business Account Created

Your Business Account has been created and is now active. An e-mail has been sent to the address you provided to confirm your Business Account creation.
Creation Date/Time: 2019-08-30 16:43

Account Owner Information	Business Information
First Name: John	Business Name: ABC Company Inc.
Last Name: Smith	Business Number: 123456789RM0001
Position Title: 	Business Type: Exporter
Email Address: John.Smith@email.com	Authorized ID: SE3800
Telephone Number: 123-456-7890	Contact First Name: John
Telephone Extension: -	Contact Last name: Smith
Fax Number: -	Contact Telephone Number: 123-456-7890
Address: 555 Main Street	Contact Telephone Extension: -
City: Ottawa	Contact Email: John.Smith@email.com
Province/State: Ontario	Address/Telephone Number: 555 Main Street
Postal/Zip Code: K2P 0X5	City: NORTH VANCOUVER
Country: Canada	Province/State: British Columbia
	Postal/Zip Code: V7M 1R9
	Country: Canada

[Print/Download Business Account Information \(PDF\)](#)

If you are the authorized representative of another business you can create an additional Business Account by selecting Create Another Business Account.

Create Another Business Account

If you do not want to create another Business Account at this time, select OK.

OK



3. Managing User Access for a CERS Business Account

- Accessing an Exporter Business Account
- Accessing a Customs Service Provider Business Account
- Applying a Default Log In for Business Account



Accessing a CERS Business Account

When you log into the CERS Portal, the **Business Accounts** section will display a list of accounts that you are permitted to access. (Click the Business Name hyperlink to access the associated CERS Business Account).

CERS Portal Canada

Business Accounts My Profile

John Smith (URN: MO516723)
[CERS Portal Help and Support](#) | [Log out](#)

Business Accounts [Create Business Account](#)

Default log in Business Account: none

Show 10 entries Filter

Business Name	Business Number	Business Type	Role	Action
ABC Company Inc.	123456789RM0001	Exporter	Account Owner	<input type="button" value="Modify"/>

Showing 1 to 1 of 1 entries



CERS Business Account

Within a CERS Business Account, use the tabs to access various account sections (Bulletins, Export Documents, Lookups, Templates, and User Access).

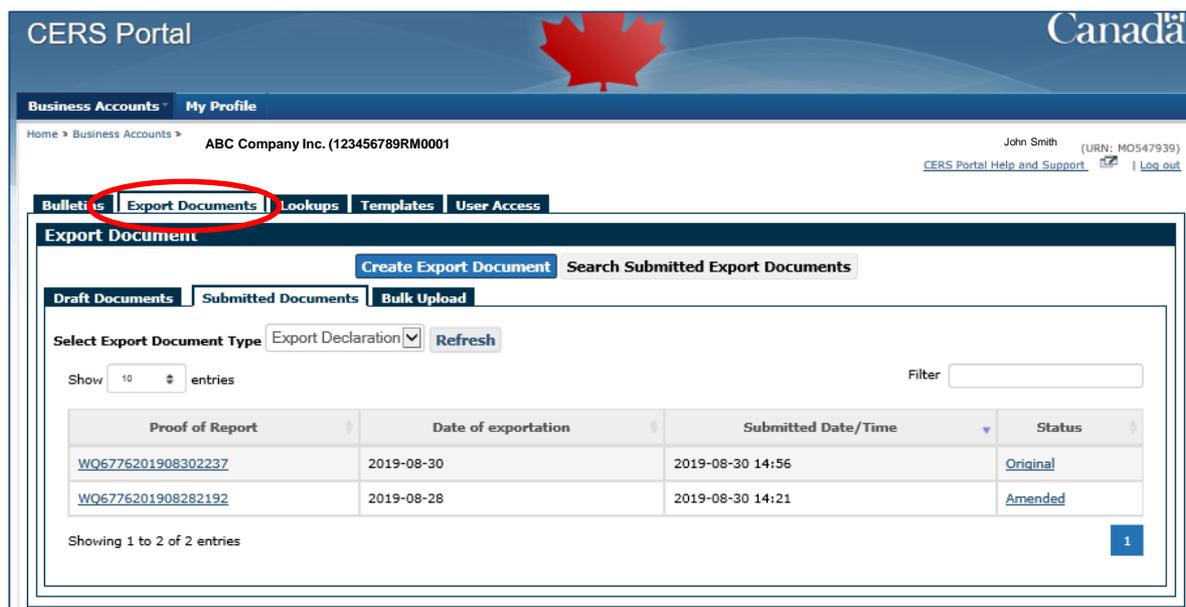
The screenshot shows the CERS Portal interface. At the top, there is a header with 'CERS Portal' on the left and the 'Canada' logo on the right. Below the header is a navigation bar with 'Business Accounts' and 'My Profile' tabs. The main content area shows a breadcrumb trail: 'Home > Business Accounts > ABC Company Inc. (123456789RM0001)'. On the right side of the main content area, there is user information: 'John Smith (URN: MOS16723)' and links for 'CERS Portal Help and Support' and 'Log out'. A red oval highlights the navigation tabs: 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. Below the tabs is a section titled 'Bulletins' containing a table with two columns: 'Subject' and 'Published'.

Subject	Published
2019-08-30 Morning HC	2019-08-30
2019-08-29 Morning HC	2019-08-29

Exporter Business Account

When accessing an Exporter Business Account, the tabs below pertain to all program features used by the exporter company (Bulletins, Export Documents, Lookups, Templates, and User Access).

- Example: The Export Documents section permits users to view CERS Export Declarations and Summary Reports that the exporter company had submitted to the CBSA.



The screenshot shows the CERS Portal interface for an Exporter Business Account. The user is logged in as John Smith (URN: MO547939). The navigation menu includes Bulletins, **Export Documents** (highlighted with a red circle), Lookups, Templates, and User Access. The main content area is titled "Export Document" and includes a "Create Export Document" button and a "Search Submitted Export Documents" input field. Below this, there are tabs for "Draft Documents", "Submitted Documents", and "Bulk Upload". The "Submitted Documents" tab is active, showing a table of export declarations. The table has columns for "Proof of Report", "Date of exportation", "Submitted Date/Time", and "Status". Two entries are visible: one for "Original" status and one for "Amended" status.

Proof of Report	Date of exportation	Submitted Date/Time	Status
WQ6776201908302237	2019-08-30	2019-08-30 14:56	Original
WQ6776201908282192	2019-08-28	2019-08-30 14:21	Amended

Showing 1 to 2 of 2 entries



Customs Service Provider Business Account

After logging into the CERS Portal, a customs service provider (CSP) member will be able to use “Business Accounts” section to access his/her company’s **Customs Service Provider Business Account**.

CERS Portal Canada

Business Accounts | My Profile

Home > Business Accounts > ABC Service Provider Inc. (123456789RM0001) John Smith (URN: MO547939)
[CERS Portal Help and Support](#) | [Log out](#)

Business Accounts

[Create Business Account](#)

Default log in Business Account:

Show entries Filter

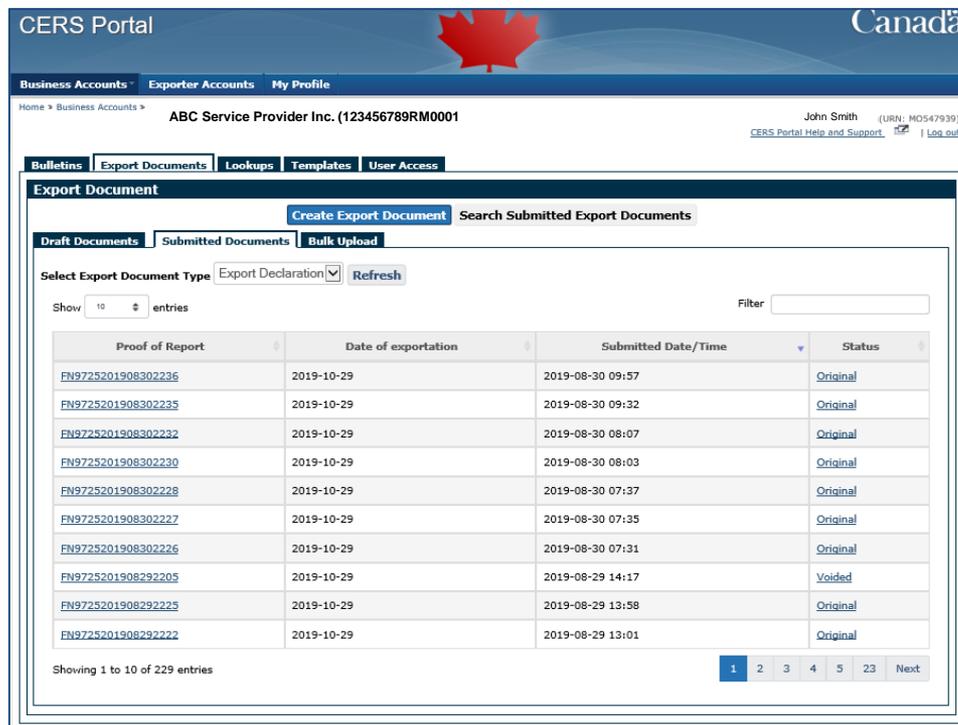
Business Name	Business Number	Business Type	Role	Action
ABC Service Provider Inc.	123456789RM0001	Customs Service Provider	Proxy Account Owner	-

Showing 1 to 1 of 1 entries (filtered from 5 total entries) 1

Customs Service Provider Business Account

When accessing a **Customs Service Provider (CSP) Business Account**, the tabs below pertain to account features used by the CSP. (e.g. Export Documents, User Access, etc...)

- **Example:** The Export Documents section permits users to view CERS Export Declarations and Summary Reports that the CSP had submitted to the CBSA on behalf of itself (i.e. The CSP was identified as the exporter of the goods).



CERS Portal

Canada

Business Accounts | Exporter Accounts | My Profile

Home > Business Accounts > ABC Service Provider Inc. (123456789RM0001) John Smith (URN: MO547939) CERS Portal Help and Support | Log out

Bulletins | Export Documents | Lookups | Templates | User Access

Export Document

Create Export Document | Search Submitted Export Documents

Draft Documents | Submitted Documents | Bulk Upload

Select Export Document Type: Export Declaration Refresh

Show 10 entries Filter

Proof of Report	Date of exportation	Submitted Date/Time	Status
FN9725201908302236	2019-10-29	2019-08-30 09:57	Original
FN9725201908302235	2019-10-29	2019-08-30 09:32	Original
FN9725201908302232	2019-10-29	2019-08-30 08:07	Original
FN9725201908302230	2019-10-29	2019-08-30 08:03	Original
FN9725201908302228	2019-10-29	2019-08-30 07:37	Original
FN9725201908302227	2019-10-29	2019-08-30 07:35	Original
FN9725201908302226	2019-10-29	2019-08-30 07:31	Original
FN9725201908292205	2019-10-29	2019-08-29 14:17	Voided
FN9725201908292225	2019-10-29	2019-08-29 13:58	Original
FN9725201908292222	2019-10-29	2019-08-29 13:01	Original

Showing 1 to 10 of 229 entries

1 2 3 4 5 23 Next



Customs Service Provider Business Account

To submit Export Documents on behalf of one of its exporter company clients, a CSP user must do the following:

- 1) Access the **Customs Service Provider Business Account**.
- 2) Select the **Exporter Accounts** link (located at the top of the screen).
- 3) Within the **Exporter Accounts** section, click the Business Name hyperlink that refers to the exporter company of interest.

CERS Portal Canada

Business Accounts **Exporter Accounts** My Profile

Home > Business Accounts > ABC Service Provider Inc. (123456789RM0001) > Exporter Accounts

John Smith (URN: MO547939)
[CERS Portal Help and Support](#) | [Log out](#)

Exporter Accounts

Show 10 entries Filter

Business Name	Business Number	Authorized ID
ABC Exporter Company	987654321RM0001	BD2489
DEF Frozen Foods Inc.	187667321RM0002	TL4619
GHI Toys Company	958421389RM0001	YS5105



Customs Service Provider Business Account

After completing steps 1 to 3, the CSP user will gain access to the CSP client's Exporter Business Account.

- **Note:** The navigation label (*Home > ...*) displayed at the top of the screen identifies that an Exporter Account is being accessed through the CSP's Business Account.

CERS Portal Canada

Business Accounts Exporter Accounts My Profile

Home > Business Accounts > ABC Service Provider Inc. (123456789RM0001) > Exporter Account > **ABC Exporter Company (987654321RM0001)** John Smith (URN: MO547939) | Log out

Export Documents Lookups Templates

Export Documents

Create Export Document

Draft Documents Submitted Documents

Note: You may save an additional 93 Draft Export Documents for this Business Account.

Show 10 entries Filter

Draft Document Name	Document Type	Saved Date/Time	Action
PB939275-20190809	Export Declaration	2019-08-09 14:01	Delete
PB939275-201989	Summary Report	2019-08-09 13:59	Delete



Applying a Default Log In for Business Account

By default, when a user logs into CERS Portal, the application will display the Business Accounts section. (Multiple entries will be shown if the user has been granted access to two or more CERS Portal Business Accounts.)

Government of Canada / Gouvernement du Canada | Canada.gc.ca | Services | Departments

CERS Portal

Business Accounts | My Profile

John Smith (URN : MO469508)
[CERS Portal Help and Support](#) | [Log out](#)

Business Accounts

[Create Business Account](#)

Default log in Business Account: [Save](#)

Show entries Filter

Business Name	Business Number	Business Type	Role	Action
ABC COMPANY ATLANTIC	987456789RM0001	Exporter	Account Owner	Modify
ABC COMPANY PACIFIC	987456789RM0002	Exporter	Account Owner	Modify

Showing 1 to 2 of 2 entries 1



Applying a Default Log In for Business Account

Within the Business Accounts section, a user can apply a default log in Business Account setting:

- Use the **Default log in Business Account** drop-down menu to select a Business Account name; and
- Click **Save**.

The screenshot shows the 'Business Accounts' management page. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, the user's name 'John Smith' and 'URN : MO469508' are displayed, along with links for 'CERS Portal Help and Support' and 'Log out'. The main content area is titled 'Business Accounts' and features a 'Create Business Account' button. The 'Default log in Business Account:' dropdown menu is open, showing 'none' as the current selection. A red circle highlights the 'ABC COMPANY ATLANTIC (987456789RM0001)' option. Below the dropdown, there is a 'Save' button and a 'Filter' input field. A table lists the business accounts with columns for Business Name, Business Number, Business Type, Role, and Action. The table contains two entries: 'ABC COMPANY ATLANTIC' and 'ABC COMPANY PACIFIC'. At the bottom, it shows 'Showing 1 to 2 of 2 entries' and a 'Preferred Time Zone: Eastern' setting.

Business Name	Business Number	Business Type	Role	Action
ABC COMPANY ATLANTIC	987456789RM0001	Exporter	Account Owner	Modify
ABC COMPANY PACIFIC	987456789RM0002	Exporter	Account Owner	Modify



Applying a Default Log In for Business Account

Outcome: The next time the user logs into CERS Portal, the application will automatically load and display the default log in Business Account

The screenshot shows the CERS Portal interface. At the top, there is a navigation bar with the Government of Canada logo and text in both English and French, along with links for Canada.gc.ca, Services, and Departments. Below this is a header area with the text 'CERS Portal' and the Canada wordmark. A red maple leaf is centered in the background. A navigation menu contains 'Business Accounts' and 'My Profile', with 'Business Accounts' circled in red. Below the menu, a breadcrumb trail reads 'Home > Business Accounts > ABC COMPANY ATLANTIC (987456789RM0001)'. On the right side, the user's name 'John Smith (URN : MO469508)' is displayed, along with links for 'CERS Portal Help and Support' and 'Log out'. At the bottom, there are tabs for 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The 'Bulletins' tab is active, showing a table with columns for 'Subject' and 'Published'.



Applying a Default Log In for Business Account

To remove a default log in Business Account setting:

- Access the Business Accounts section;
- Change the **Default log in Business Account** drop-down menu to option “**none**”; and
- Click Save.

The screenshot shows the 'Business Accounts' section of a web application. The 'Business Accounts' menu item is circled in red. The 'Default log in Business Account' dropdown menu is also circled in red, showing the 'none' option selected. The dropdown menu lists two other options: 'ABC COMPANY ATLANTIC (987456789RM0001)' and 'ABC COMPANY PACIFIC (987456789RM0002)'. A 'Save' button is visible next to the dropdown.



4. Managing User Access for a CERS Business Account

- Adding a CERS user to a company's CERS Business Account
- Removing a CERS user's access to the CERS Business Account
- Editing a CERS user's account access privileges



Adding a User to a CERS Business Account

To grant a person access to your company's CERS Business Account:

- 1) Log into the CERS Portal and access your company's Business Account.
- 2) Select the **User Access** tab.
- 3) Click the **Add User** button.

- The User Access section will display a list of all CERS Users that have been granted access to the CERS Business Account.

The screenshot displays the 'User Access' section of the CERS Business Accounts portal. The 'User Access' tab is highlighted with a red circle. Below the tab, there is a table listing users with columns for Last Name, First Name, URN, User Role, and User Status. The 'Add User' button is also circled in red. The table shows two entries:

Last Name	First Name	URN	User Role	User Status
Smith	John	FA062895	Proxy Account Owner	Active
Smith	Robert	MO547939	Account Owner	Active

Showing 1 to 2 of 2 entries



Adding a CERS User to a CERS Business Account

Within the **Add User** page, enter the following information:

- The CERS User's URN (i.e. User Reference Number);
- The CERS User's last name; and
- The CERS User's e-mail address

Business Accounts | My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001)

John Smith (URN: MO547939)
[CERS Portal Help and Support](#) | [Log out](#)

Bulletins | Export Documents | Lookups | Templates | **User Access**

Add User - Step 1 of 2

All fields are mandatory.

User Reference Number (URN):

Last Name:

Email Address:



Adding a CERS User to a CERS Business Account

You will need to specify the account privileges that are to be granted to the CERS User by selecting a **user role**:

- Account Browser
- Account User
- Proxy Account Owner

Business Accounts My Profile

Home > Business Accounts > | ABC Company Inc. (123456789RM0001)

Bulletins Export Documents Lookups Templates User Access

Add User - Step 2 of 2

All fields are mandatory.

User Reference Number (URN): MB634595

Last Name: Smith

First Name: John

Email Address: John.Smith@email.com

Select a user role for Smith, John

- Account Browser
- Account User
- Proxy Account Owner

Submit Cancel



Adding a CERS User to a CERS Business Account

- A **Proxy Account Owner** has almost the same (full) privileges as the official CERS Portal business Account Owner, with the following exceptions:
 - This user cannot add or remove other Proxy Account Owners; and
 - This user cannot edit or delete the Business Account
- An **Account User** can create/edit/delete Export Documents, Lookups, and Templates. This user cannot edit or delete the Business Account. This user cannot view or edit User Access.
- An **Account Browser** is similar to an Account User, with the exception that the browser can only view Export Documents, Lookups, and Templates.

Note: It is highly recommended that companies have more than one account owner by ensuring a Proxy Account Owner is assigned to all Business Accounts.



Editing a CERS User's Business Account Privileges

Within the **User Access** tab, click the **Last Name** entry for the CERS User of interest.

- **NOTE:** Only the Account Owner and Proxy Account Owner(s) can reach the User Access tab (and therefore control which CERS Users are granted access to the CERS Business Account).

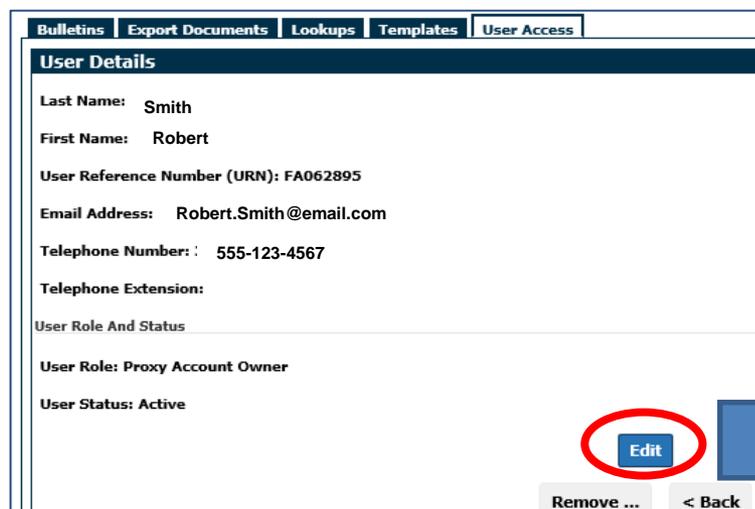
The screenshot displays the 'User Access' tab within a web application. The interface includes a navigation bar with 'Business Accounts' and 'My Profile' tabs. Below the navigation bar, there are tabs for 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The 'User Access' tab is active, showing a table of users. The table has columns for 'Last Name', 'First Name', 'URN', 'User Role', and 'User Status'. The first row shows 'Smith' in the 'Last Name' column, which is circled in red. The second row shows 'Smith' in the 'Last Name' column. The table also includes an 'Add User' button and a 'Filter' input field.

Last Name	First Name	URN	User Role	User Status
Smith	John	FA062895	Proxy Account Owner	Active
Smith	Robert	MO547939	Account Owner	Active

Editing a CERS User's Business Account Privileges

Within the **User Details** page:

- You can click the **Remove** button to remove the CERS User's access to the Business Account
- You can click the **Edit** button to modify the CERS User's account privilege settings (e.g. Convert an Account User into an Account Browser)

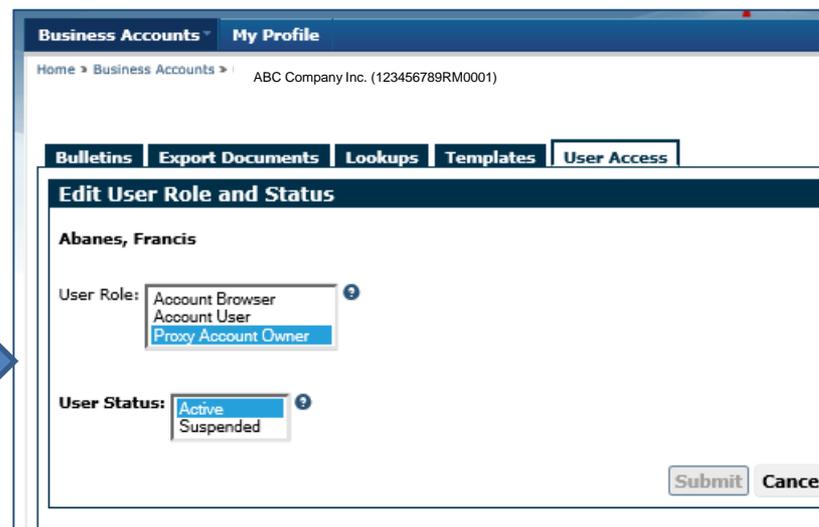


User Details

Last Name: Smith
First Name: Robert
User Reference Number (URN): FA062895
Email Address: Robert.Smith@email.com
Telephone Number: 555-123-4567
Telephone Extension:
User Role And Status
User Role: Proxy Account Owner
User Status: Active

Edit (circled in red)

Remove ... < Back



Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001)

Edit User Role and Status

Abanes, Francis

User Role: Account Browser
Account User
Proxy Account Owner

User Status: Active
Suspended

Submit Cancel



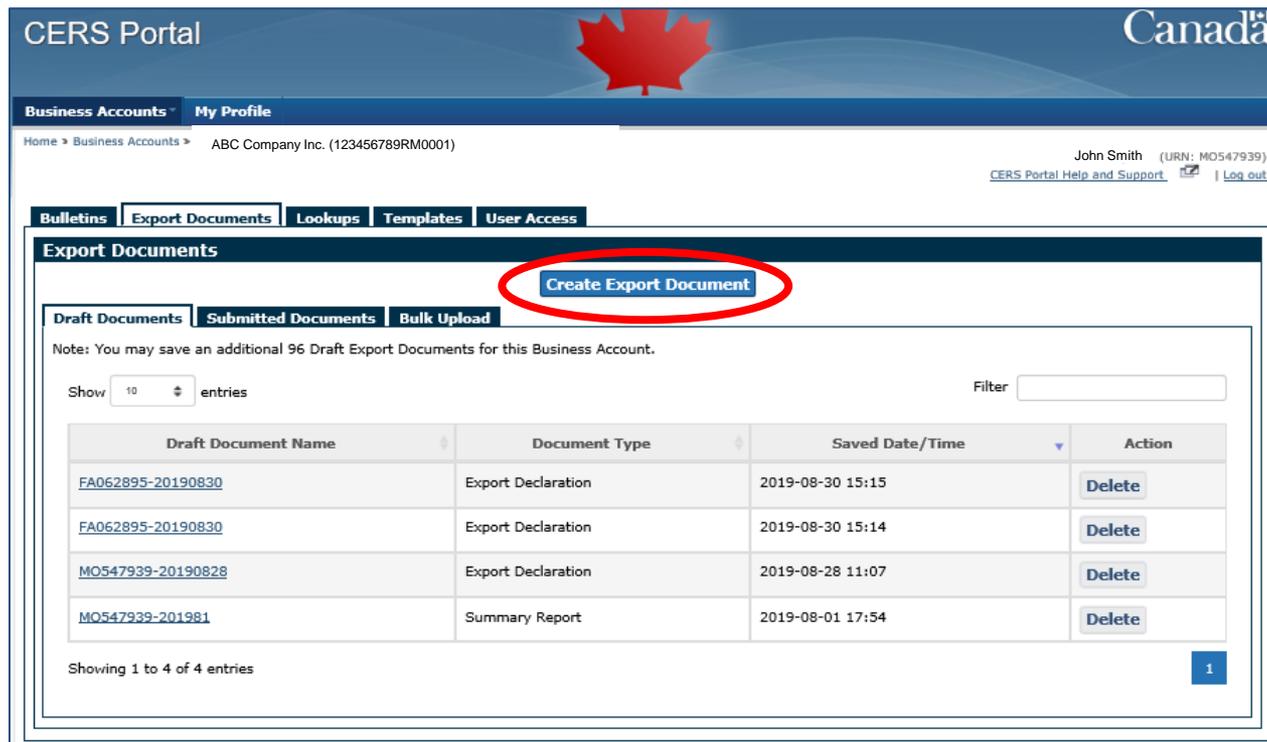
4. Creating and Submitting a New Export Declaration

- Export Documents tab
- Lookup feature
- Help icon
- Check for Errors
- Save features
- Print/Download submitted Export Document (PDF)
- Create Template from submitted Export Declaration

Creating a New CERS Export Declaration

Within a CERS Business Account, the **Export Documents** section provides resources for creating, viewing, and editing Export Documents (i.e. CERS Export Declarations and Summary Reports)

- Click the **Create Export Document** button to begin creating a new document



The screenshot shows the CERS Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, the user's name 'John Smith' and URN 'MO547939' are displayed. The main content area is titled 'Export Documents' and contains a 'Create Export Document' button, which is circled in red. Below the button, there are tabs for 'Draft Documents', 'Submitted Documents', and 'Bulk Upload'. A table lists draft documents with columns for 'Draft Document Name', 'Document Type', 'Saved Date/Time', and 'Action'.

Draft Document Name	Document Type	Saved Date/Time	Action
FA062895-20190830	Export Declaration	2019-08-30 15:15	Delete
FA062895-20190830	Export Declaration	2019-08-30 15:14	Delete
MO547939-20190828	Export Declaration	2019-08-28 11:07	Delete
MO547939-201981	Summary Report	2019-08-01 17:54	Delete



Creating a New CERS Export Declaration

Within the **Create Export Document** page, the user is presented with the following options:

- 1) Create a new, draft **Export Declaration**
- 2) Create a new, draft **Summary Report**
- 3) Use a text file to upload one or more draft Export Declarations into CERS (**Bulk Load**)
- 4) Use an existing **Document Template** to create a draft Export Declaration or Summary Report

CERS Portal

Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001)

Bulletins **Export Documents** Lookups Templates User Access

Create Export Document

Note: You have space to save 96 Draft Export Documents for this Business Account.

Select the type of Export Document you want to create:

- Export Declaration
- Summary Report
- Bulk Loads
- Use Document Template

Submit Cancel



Creating a New CERS Export Declaration

5) (For CSPs) Create a new, draft “One Time Submission”

The screenshot displays the CERS Portal interface. At the top, there is a blue header with the text 'CERS Portal' and a red maple leaf logo. Below the header is a navigation bar with three tabs: 'Business Accounts', 'Exporter Accounts', and 'My Profile'. The main content area shows a breadcrumb trail: 'Home > Business Accounts > ABC Service Provider Inc. (123456789RM0001)'. Below this is another navigation bar with five tabs: 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The 'Export Documents' tab is selected, and the page title is 'Create Export Document'. A note states: 'Note: You have space to save 95 Draft Export Documents for this Business Account.' Below the note, there is a label 'Select the type of Export Document you want to create:' followed by a list of options: 'Export Declaration', 'Summary Report', 'Bulk Loads', 'One Time Submission', and 'Use Document Template'. At the bottom right of the form, there are two buttons: 'Submit' and 'Cancel'.



Create Export Declaration: Exporter Section

The Create Export Declaration page is divided into various additional tabs:

- Select the **Exporter** tab to begin entering information regarding the exporter of the commercial goods

The screenshot displays the CERS Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile' tabs. Below this, the breadcrumb trail reads 'Home > Business Accounts > ABC Company Inc. (123456789RM0001)'. The main content area features a series of tabs: 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The 'Export Documents' tab is active, and within it, the 'Create Export Declaration' section is shown. This section has a sub-tabbed interface with 'Exporter', 'Consignee', 'Service Provider', 'Certifier', 'Commodity', 'Other Export Details', and 'Customs Details'. The 'Exporter' tab is highlighted with a red circle. The form fields under the 'Exporter' tab include: 'Business Number' (123456789RM0001), 'Authorized ID' (WQ6776), 'Lookup Name' (with a 'Select a Lookup' button), 'Are parties related?' (radio buttons for Yes and No), 'Exporter Name', 'Street Address', and 'City'.



Create Export Declaration: Consignee Section

- Select the **Consignee** tab to begin entering information regarding the consignee

[CERS](#)

Bulletins | **Export Documents** | Lookups | Templates | User Access

Create Export Declaration

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001

All fields are mandatory unless otherwise specified.

Exporter | **Consignee** | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Lookup Name ⓘ
 [Select a Lookup](#)
Mandatory if creating a lookup

Consignee Name ⓘ

Street Address ⓘ

City ⓘ

Country ⓘ

Province/State (optional) ⓘ

Use the above information to [Create Consignee Lookup](#)

Exporter | **Consignee** | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Complete all mandatory fields within the tabs above.

[Check for Errors](#) [Save and Continue](#) [Save and Finish Later](#) [Submit to the CBSA](#)

[Print/Download Document \(Select to view PDF size\)](#) [Cancel](#)



Create Export Declaration: Service Provider Section

- Select the **Service Provider** tab to begin entering information regarding the applicable customs service provider

Reporting Scenario 1: When an exporter company creates a CERS Export Declaration, all fields contained within the Service Provider section will be disabled.

The screenshot shows the 'Create Export Declaration' web form. At the top, there are navigation tabs: 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. Below these, the title 'Create Export Declaration' is displayed. The form contains the following information:

- Exporter Name: ABC Company Inc.
- Exporter Business Number: 123456789RM0001
- All fields are mandatory unless otherwise specified.

The form has several tabs: 'Exporter', 'Consignee', 'Service Provider', 'Certifier', 'Commodity', 'Other Export Details', and 'Customs Details'. The 'Service Provider' tab is selected and circled in red. The fields under this tab are:

- Authorized ID (text input)
- Service Provider Name (text input)
- Street Address (text input)
- City (text input)
- Country (dropdown menu, currently showing '-- Select Country --')
- Province/State (dropdown menu, currently showing '-- Select Province/State --')
- Postal/Zip Code (text input)
- Telephone Number (optional) (text input)
- Telephone Extension (text input)

At the bottom of the form, there are buttons for 'Check for Errors', 'Save and Continue', 'Save and Finish Later', and 'Submit to the CBSA'. There is also a link for 'Print/Download Document (Select to view PDF size)' and a 'Cancel' button.



Create Export Declaration: Service Provider Section

Reporting Scenario 2:

When a customs service provider (CSP) creates a CERS Export Declaration for itself (i.e. The CSP is being identified as the exporter of the goods), all fields contained within the Service Provider section will be disabled. The CSP will be required to complete the Exporter section and supply information regarding its company name, address, and contact information.

CERS Portal

Business Accounts | Exporter Accounts | My Profile

Home > Business Accounts > ABC Service Provider Inc. (123456789RM0001)

Bulletins | Export Documents | Lookups | Templates | User Access

Create Export Declaration

Exporter Name: ABC Service Provider Inc.
Exporter Business Number: 123456789RM0001

All fields are mandatory unless otherwise specified.

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Authorization ID

Service Provider Name 

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Business Number: 123456789RM0001 | Authorization ID: FN9725

Lookup Name 
 [Select a Lookup](#)

Mandatory if creating a lookup

Are parties related? 
 Yes
 No

Exporter Name 

Street Address 



Create Export Declaration: Service Provider Section

Reporting Scenario 3:

When a CSP creates a CERS Export Declaration on behalf of a client (i.e. Another entity is being identified as the exporter of the goods), all fields contained within the Service Provider section will be enabled. The CSP will be required to complete the Service Provider section to supply information regarding itself and complete the Exporter section to supply name, address, and contact information regarding its client.

CERS Portal

Business Accounts | Exporter Accounts | My Profile

Home > Business Accounts > ABC Service Provider Inc. (123456789RM0001) > Exporter Accounts > ABC Exporter Company Inc. (987654321RM0002)

Export Documents | Lookups | Templates

Create Export Declaration

Exporter Name: ABC Exporter Company Inc.
Exporter Business Number: 987654321RM0002

All fields are mandatory unless otherwise specified.

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Authorization ID

Lookup Name ⓘ

Mandatory if creating a lookup [Select a Lookup](#)

Service Provider Name ⓘ

Street Address ⓘ

City ⓘ

Country ⓘ

Province/State ⓘ

Postal/Zip Code ⓘ



Create Export Declaration: Certifier Section

- Select the **Certifier** tab to begin entering information regarding the individual who is responsible for creating and submitting this Export Declaration to the CBSA

Export Documents | **Lookups** | **Templates** | **User Access**

Create Export Declaration

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001
All fields are mandatory unless otherwise specified

Exporter | **Consignee** | **Service Provider** | **Certifier** | **Commodity** | **Other Export Details** | **Customs Details**

Lookup Name [Select a Lookup](#)
Mandatory if creating a lookup

Certifier Name

Company Name

Street Address

City

Country

Province/State

Postal/Zip Code

Telephone Number **Telephone Extension**

Fax Number

Email Address

Use the above information to [Create Certifier Lookup](#)

Exporter | **Consignee** | **Service Provider** | **Certifier** | **Commodity** | **Other Export Details** | **Customs Details**

Complete all mandatory fields within the tabs above.



Create Export Declaration: Commodity Section

- Select the **Commodity** tab to begin entering information regarding the commercial goods that are being exported from Canada

Bulletins | **Export Documents** | Lookups | Templates | User Access

Create Export Declaration

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001

All fields are mandatory unless otherwise specified.

Exporter | Consignee | Service Provider | Certifier | **Commodity** | Other Export Details | Customs Details

Freight Charge [?]

Gross Weight [?] Unit of measure [?]
 Select Unit of Measure

Currency of Declared Value [?]
Select Currency

Commodity

[Add Commodity](#)

Show entries Filter

Number	HS8 Code	Quantity	UOM	Value	Edit	Delete
Export Document Template List is Empty						

Showing 0 to 0 of 0 entries

Exporter | Consignee | Service Provider | Certifier | **Commodity** | Other Export Details | Customs Details

Complete all mandatory fields within the tabs above.

[Check for Errors](#) [Save and Continue](#) [Save and Finish Later](#) [Submit to the CBSA](#)

[Print/Download Document \(Select to view PDF size\)](#) [Cancel](#)

Create Export Declaration: Commodity Entry

- Within the **Commodity** tab, click the **Add Commodity** button to begin assigning a new commodity entry to the Export Declaration

Commodity

Show 10 entries Filter

Number	HS8 Code	Quantity	UOM	Value	Edit	Delete
Export Document Template List is Empty						

Showing 0 to 0 of 0 entries

Exporter Consignee Service Provider Certifier **Commodity** Other Export Details Customs Details

Bulletins Export Documents Lookups Templates User Access

Create Export Declaration

Commodity #001

All fields are mandatory unless otherwise specified.

Harmonized System

HS Commodity code [Go to search screen](#)

Official Description

Your Description

Conveyance ID Number

Others

Quantity Unit of measure

Value FOB point of exit

Origin

Country Province

Use the above information to [Create HS Code Lookup](#)

Commodity Entry: HS Commodity Code Search

- When creating a commodity entry, you can use a search feature to find the applicable 8-digit Canadian Export Classification code

The screenshot shows the 'Create Export Declaration' form with the following fields:

- Commodity #001
- All fields are mandatory unless otherwise specified.
- Harmonized System
- HS Commodity code (with a 'Go to search screen' button circled in red)
- Official Description
- Your Description

The search modal window shows the following search criteria:

- Search HS8 Code By: Code Description
- Whole words All Inclusive (and)
- Search for: 4403
- Buttons: Search, Select a Lookup

The search results table is as follows:

Unit of measure	Description	Action	
MTR	Poles f tel/telegraph/elec lines, coniferous, treat w paint/stains/creosote/etc	Select	
N/A	Logs, of coniferous, treated with paint/stains/creosote/other preservatives, nes	Select	
MTR	Poles f tel/telegraph/elec lines, non-con, treat w paint/stains/creosote/etc	Select	
N/A	Logs, of non-con, treated with paint/stains/creosote/other preservatives, nes	Select	
4403.21.20	MTR	Poles, piles and posts, of pine, of any cross-sectional dim >= 15 cm,n treated	Select
4403.21.90	MTQ	Logs, of pine, of which any cross-sectional dimension >= 15 cm, not treated, nes	Select
4403.22.10	MTR	Poles, piles and posts, of pine, of any cross-sectional dim < 15 cm,n treated	Select
4403.22.20	MTQ	Logs f pulping, of pine, of any cross-sectional dimension < 15 cm, not treated	Select
4403.22.90	MTQ	Logs, of pine, of which any cross-sectional dimension < 15 cm, not treated, nes	Select
4403.23.20	MTR	Poles,piles & posts,of fir & spruce, any cross-sectional dim >= 15 cm,n treated	Select

Showing 1 to 10 of 38 entries



Commodity Entry: HS Commodity Code Search

NOTE: Within an Export Declaration or Summary Report, the reporter must supply an 8-digit Canadian Export Classification code (HS code) to identify each unique type of commercial good that is being exported from Canada. The codes are obtained from Statistics Canada's Canadian Export Classification system.

Reference: <https://www150.statcan.gc.ca/n1/en/catalogue/65-209-X>



Commodity Entry: HS Commodity Code Search

Search Option 1: Search by Code

Within the *Search HS8 Code* page:

- Select radio button option *Code*;
- Enter **at least 2** digits into the *Search for* text field; and
- Click Search.

CERS will display a list of matching Canadian Export Classification code that begin with the specified digits.

Bulletins | Export Documents | Lookups | Templates | User Access

Create Export Declaration

Search HS8 Code By

Code Description

Whole words All Inclusive (and)

Search for
44

[Search](#) [Select a Lookup](#)

Show 10 entries Filter

HS8 Code	Unit of measure	Description	Action
4401.11.00	KGM	Fuel wood, of coniferous, in logs/billets/twigs/faggots/similar forms	Select
4401.12.00	KGM	Fuel wood, of non-coniferous, in logs/billets/twigs/faggots/similar forms	Select
4401.21.00	TNE	Wood in chips, coniferous	Select
4401.22.00	TNE	Wood in chips, non-coniferous	Select
4401.31.00	KGM	Wood pellets, agglomerated	Select
4401.39.10	KGM	Firelogs, of agglomerated wood sawdust	Select
4401.39.90	KGM	Sawdust and wood waste and scrap, agglomerated in briquettes/similar forms, nes	Select
4401.40.10	KGM	Wood shavings, not agglomerated	Select
4401.40.90	KGM	Sawdust and wood waste and scrap, not agglomerated, nes	Select
4402.10.00	TNE	Wood charcoal, incl shell or nut charcoal, of bamboo, w/n agglo	Select

Showing 1 to 10 of 194 entries

1 2 3 4 5 20 Next

[< Back](#)



Commodity Entry: HS Commodity Code Search

Search Option 2: Search by Description

Within the *Search HS8 Code* page:

- Select radio button option *Description*;
- Enter one or more keywords into the *Search for* text field; and
- Click Search.

CERS will display a list of Canadian Export Classification codes possessing a description entry that contains the specified keyword(s).

The screenshot shows the 'Create Export Declaration' page with the following elements:

- Navigation tabs: Bulletins, Export Documents, Lookups, Templates, User Access
- Section: Create Export Declaration
- Search HSB Code By: Code (unselected), Description (selected)
- Options: Whole words (unselected), All Inclusive (and) (unselected)
- Search for: Input field containing 'abor'
- Buttons: Search, Select a Lookup
- Results: A table with 10 entries, showing columns for HSB Code, Unit of measure, Description, and Action (Select).
- Footer: Showing 1 to 10 of 16 entries, pagination (1, 2, Next), and a Back button.

HSB Code	Unit of measure	Description	Action
2840.11.00	KGM	Disodium tetraborate (refined borax), anhydrous	Select
2840.19.00	KGM	Disodium tetraborate (refined borax), o/t anhydrous	Select
3822.00.00	N/A	Composite diagnostic or laboratory reagents, nes,o/t those of No 30.02 or 30.06	Select
6909.11.00	N/A	Ceramic wares for laboratory,chemical or other technical uses,of porcelain/china	Select
6909.19.00	N/A	Ceramic wares for laboratory, chemical or other technical uses, nes	Select
7017.10.00	N/A	Laboratory, hygienic/pharmaceutical glassware,etc,of fused quartz/o fused silica	Select
7017.90.00	N/A	Laboratory, hygienic or pharmaceutical glassware, w/n graduated/calibrated, nes	Select
8419.20.00	NMB	Medical, surgical or laboratory sterilizers	Select
8419.89.00	N/A	Machinery, plant or laboratory equip for treat of mat by a change of temp nes	Select
8514.10.00	NMB	Industrial or laboratory electric resistance heated furnaces and ovens	Select



Commodity Entry: HS Commodity Code Search

Search Option 2: Search by Description

When performing a search, you can select the **All Inclusive (and)** checkbox to limit the search results to those entries where **all** of the specified *Search for* characters are assigned to the Canadian Export Classification code (HS Code - Description entry).

The screenshot shows a web application interface for 'Create Export Declaration'. It includes a navigation menu with 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The 'Lookups' section is active. Below the navigation, there are search options: 'Search HSB Code By' with radio buttons for 'Code' and 'Description' (selected), and checkboxes for 'Whole words' and 'All Inclusive (and)' (checked). A search input field contains 'abor anh'. Below the input are 'Search' and 'Select a Lookup' buttons. The results section shows 'Show 10 entries' and a 'Filter' field. A table displays two results:

HSB Code	Unit of measure	Description	Action
2840.11.00	KGM	Disodium tetraborate (refined borax), anhydrous	Select
2840.19.00	KGM	Disodium tetraborate (refined borax), o/t anhydrous	Select

Showing 1 to 2 of 2 entries

< Back



Commodity Entry: HS Commodity Code Search

Search Option 2: Search by Description

When performing a search, you can select the **Whole words** checkbox to limit the search results to those entries where **at least one** of the specified *Search for* keyword(s) matches a whole word assigned to the Canadian Export Classification code (HS Code - Description entry).

Bulletins | Export Documents | Lookups | Templates | User Access

Create Export Declaration

Search HS8 Code By

Code Description

Whole words All Inclusive (and)

Search for

lactose anhydrous

[Search](#) [Select a Lookup](#)

Show 10 entries Filter

HS8 Code	Unit of measure	Description	Action
1702.11.00	KGM	Lactose and lactose syrup, containing >= 99% lactose, as anhydrous lactose	Select
1702.19.00	KGM	Lactose and lactose syrup, nes	Select
2814.10.00	KGM	Anhydrous ammonia	Select
2840.11.00	KGM	Disodium tetraborate (refined borax), anhydrous	Select
2840.19.00	KGM	Disodium tetraborate (refined borax), o/t anhydrous	Select

Showing 1 to 5 of 5 entries

[< Back](#)



Commodity Entry: HS Commodity Code Search

Search Option 2: Search by Description

When performing a search, you can select both the **Whole words** and the **All Inclusive (and)** checkboxes to limit the search results to those entries where **all** of the specified *Search for* keywords match whole words assigned to the Canadian Export Classification code (HS Code - Description entry).

The screenshot shows a web application interface for 'Create Export Declaration'. It features a navigation bar with 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The main content area has a search form titled 'Search HS8 Code By' with radio buttons for 'Code' and 'Description' (selected). Checkboxes for 'Whole words' and 'All Inclusive (and)' are checked. The search input field contains 'lactose anhydrous'. Below the search field are 'Search' and 'Select a Lookup' buttons. The results section shows 'Show 10 entries' and a 'Filter' field. A table displays one result with columns for 'HS8 Code', 'Unit of measure', 'Description', and 'Action'. The table content is as follows:

HS8 Code	Unit of measure	Description	Action
1702.11.00	KGM	Lactose and lactose syrup, containing >= 99% lactose, as anhydrous lactose	Select

Below the table, it says 'Showing 1 to 1 of 1 entries' and a '< Back' button is visible.



Commodity Entry: HS Commodity Code Search

Create Export Declaration

Search HS8 Code By

Code Description

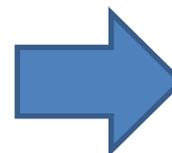
Whole words All Inclusive (and)

Search for
4403

Search Select a Lookup

Show 10 entries Filter

HS8 Code	Unit of measure	Description	Action
4403.11.10	MTR	Poles f tel/telegraph/elec lines, coniferous, treat w paint/stains/creosote/etc	Select



Create Export Declaration

Commodity #001

All fields are mandatory unless otherwise specified.

Harmonized System

HS Commodity code 4403.11.10 **Go to search screen**

Official Description
Poles f tel/telegraph/elec lines, coniferous, treat w paint/stains/creosote/etc

Your Description

Conveyance ID Number

Others

Quantity Unit of measure
Metre

Value FOB point of exit

Origin

Country -- Select Country -- Province -- Select Province --

Use the above information to **Create HS Code Lookup**

Save **Cancel**

Following a successful search operation, click the *Select* button to transfer the chosen Canadian Export Classification code entry to the Create Export Declaration – Commodity page.



Commodity Entry: HS Commodity Code Search

Note:

The Create Export Declaration page will retrieve and display a Statistics Canada – Export Classification system description of goods that is associated with the HS Commodity code entry. (This information is displayed within the “Official Description” field.) The reporter is required to assign his/her own description of the commercial goods within the “Your Description” field.

The screenshot shows a web application interface for creating an export declaration. At the top, there are navigation tabs: "Bulletins", "Export Documents", "Lookups", "Templates", and "User Access". The main heading is "Create Export Declaration". Below this, there is a field for "Commodity #001". A note states "All fields are mandatory unless otherwise specified." The form includes a section for "Harmonized System" with a sub-section for "HS Commodity code" containing a text input field with the value "4403.11.10" and a "Go to search screen" button. Below this is the "Official Description" field, which is a scrollable text area containing the text "Poles f tel/telegraph/elec lines, coniferous, treat w paint/stains/creosote/etc". At the bottom is the "Your Description" field, which is an empty scrollable text area.



Create Export Declaration: Other Export Details Tab

- Select the **Other Export Details** tab to begin entering miscellaneous information regarding the commercial export movement

Create Export Declaration

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001

All fields are mandatory unless otherwise specified.

Exporter | Consignee | Service Provider | Certifier | Commodity | **Other Export Details** | Customs Details

Mode of Transport

Mode of Transport [?]
-- Select Mode Of Transport --

Place of Exit

Province [?] Customs Office [?]
-- Select Province -- -- Select Place of Exit --

Exporting Carrier

Carrier Name [?]
[Text Field]

Carrier Code [?] Unique Carrier-Assigned Code [?]
[Text Field] [Text Field]

Vessel Name [?]
[Text Field]

Are the goods containerized? [?] Yes No

Container Number(s): (If entering multiple Container Numbers, separate with commas or select the Enter key after each Container Number.) [?]
[Text Area]

Container type [?]
-- Select Container Type --

Exporter | Consignee | Service Provider | Certifier | Commodity | **Other Export Details** | Customs Details

Complete all mandatory fields within the tabs above.

Check for Errors Save and Continue Save and Finish Later Submit to the CBSA



Other Export Details Tab: Reporting Containerized Goods

Note: To enter information regarding containerized goods:

(i) Select radio button option “Yes” for “***Are the goods controlled?***”

(ii) If the goods are being stored in one or more standard transport containers, then enter the applicable **Container Number(s)** if known.

Otherwise, use the **Container type** drop-down menu to specify “*To be determined*” or to supply information regarding the applicable container storage (e.g. “*Bulk*”; “*Less than Container Load*”)

Are the goods containerized? Yes No

Container Number(s): If entering multiple Container Numbers, separate with commas or select the Enter key after each Container Number. ⓘ

TESX1

Container type ⓘ

-- Select Container Type --

Are the goods containerized? Yes No

Container Number(s): If entering multiple Container Numbers, separate with commas or select the Enter key after each Container Number. ⓘ

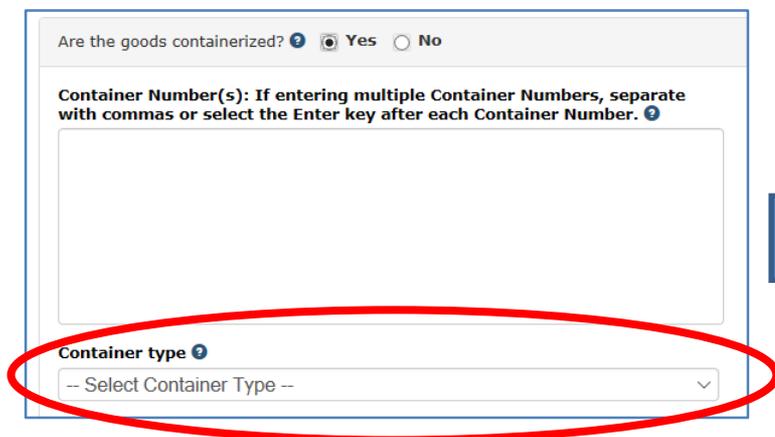
-- Select Container Type --

- Break Bulk
- Bulk**
- Heavy Lift
- Less than Container Load
- Oversize Cargo
- RORO
- To be determined

Other Export Details Tab: Reporting Containerized Goods

If the applicable Container Number(s) are not known to the reporter at the time of completing the advance (original) export declaration submission, it is acceptable for the reporter to leave the Container Number(s) field empty and assign the Container type drop-down menu setting “**To be determined**”.

- When this action is performed, the reporter is obligated to **amend** the export declaration once he/she receives information regarding the applicable Container Number(s).

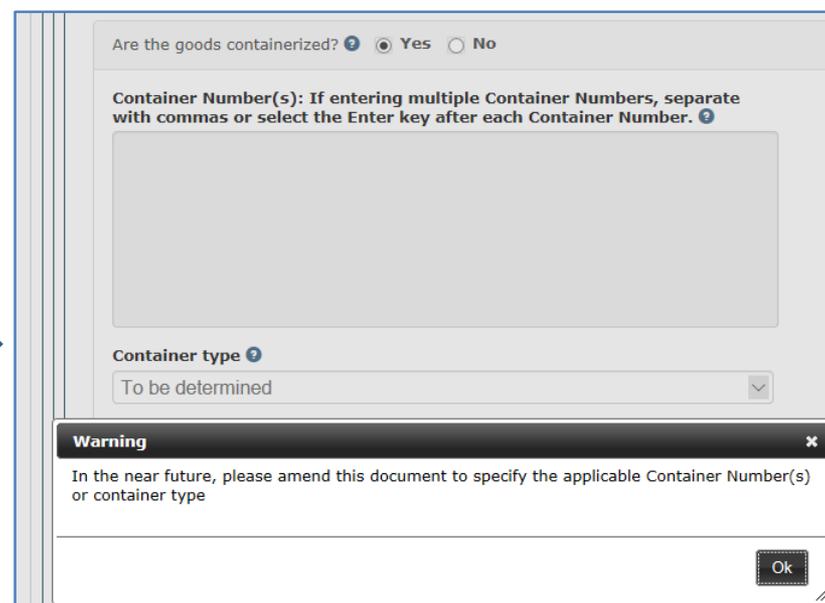
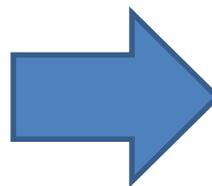


Are the goods containerized? Yes No

Container Number(s): If entering multiple Container Numbers, separate with commas or select the Enter key after each Container Number. ?

Container type ?

-- Select Container Type --



Are the goods containerized? Yes No

Container Number(s): If entering multiple Container Numbers, separate with commas or select the Enter key after each Container Number. ?

Container type ?

To be determined

Warning

In the near future, please amend this document to specify the applicable Container Number(s) or container type



Other Export Details Tab: Reporting Containerized Goods

Note that by design, the CERS Export Declaration page will not permit users to specify Container Number(s) and a Container type selection:

- Once the reporter enters data into the **Container Number(s)** field, the Container type drop-down menu will become disabled

- Once the reporter applies a setting to the **Container type** drop-down menu, the Container Number(s) field will become disabled

Are the goods containerized? Yes No

Container Number(s): If entering multiple Container Numbers, separate with commas or select the Enter key after each Container Number. [?](#)

TESX1

Container type [?](#)

-- Select Container Type --

Are the goods containerized? Yes No

Container Number(s): If entering multiple Container Numbers, separate with commas or select the Enter key after each Container Number. [?](#)

Container type [?](#)

Bulk



Create Export Declaration: Customs Details Tab

- Select the **Customs Details** tab to begin entering customs information regarding the outbound commercial goods

The screenshot shows the 'Create Export Declaration' web form. At the top, there are navigation tabs: 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. Below this is the title 'Create Export Declaration' and the exporter information: 'Exporter Name: ABC Company Inc.' and 'Exporter Business Number: 123456789RM0001'. A note states 'All fields are mandatory unless otherwise specified.' The 'Customs Details' tab is selected and highlighted with a red circle. The form contains several sections: 'Are the goods controlled?' with radio buttons for 'Yes' and 'No'; 'Export Permit Number(s): (If entering multiple permit numbers, separate with commas or select the Enter key after each permit number.)' with a text input field; 'Reason For Export' with a radio button for 'Are the goods sold?' and a dropdown for 'If no, reason for export'; 'Packages' with input fields for 'Number of packages' and 'Kind of package(s)'; and 'Other' with a dropdown for 'Country of final destination' and a date input for 'Date of exportation'. At the bottom, there are buttons for 'Check for Errors', 'Save and Continue', 'Save and Finish Later', and 'Submit to the CBSA'.



Create Export Declaration: Lookup Feature

Certain data entries (e.g. Exporter name and address) can be saved to a **Lookup** record so that this information can be retrieved and assigned to subsequent new Export Declarations.

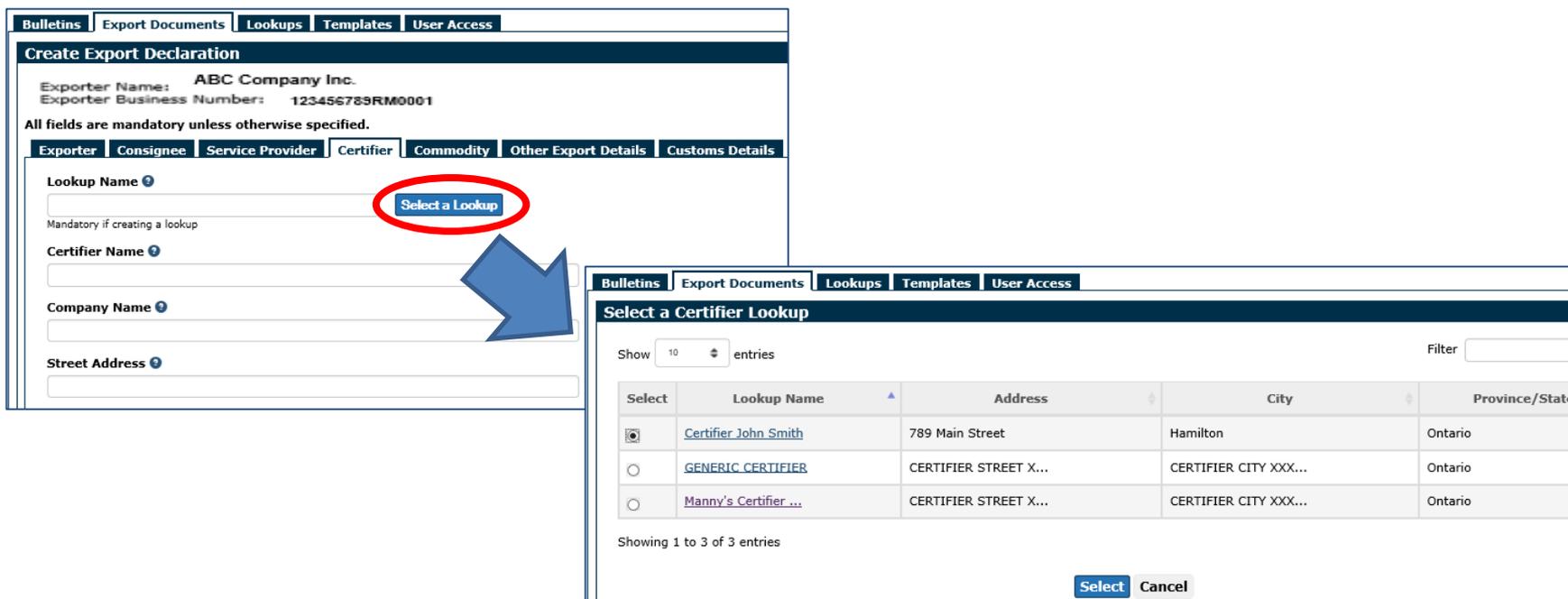
- Within the Create Export Declaration page, click the **Create ... Lookup** button to create a new Lookup record

The screenshot shows the 'Create Export Declaration' web form. The form is titled 'Create Export Declaration' and has a navigation bar with tabs: 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The form is for 'ABC Company Inc.' with 'Exporter Business Number: 123456789RM0001'. A note states 'All fields are mandatory unless otherwise specified.' The form has several tabs: 'Exporter', 'Consignee', 'Service Provider', 'Certifier', 'Commodity', 'Other Export Details', and 'Customs Details'. The 'Exporter' tab is active, showing fields for 'Business Number' (129260675RM0009), 'Authorized ID' (WQ6776), 'Lookup Name' (ABC Exporter Company), 'Are parties related?' (No), 'Exporter Name' (ABC Exporter Company), 'Street Address' (123 Queen Street), 'City' (Ottawa), 'Country' (Canada), 'Province/State' (Ontario), 'Postal/Zip Code' (K2P 0X5), 'Telephone Number (optional)' ((613)608-8972), 'Telephone Extension (optional)', 'Fax Number (optional)', and 'Exporter Reference Number(s) (optional)'. A blue button labeled 'Create Exporter Lookup' is circled in red at the bottom of the form. A small dialog box titled 'Exporter Lookup Created' is open in the bottom right corner, displaying the message 'Your new Exporter Lookup has been created.' and an 'OK' button.

Create Export Declaration: Lookup Feature

To apply an existing Lookup to a new (draft) Export Document:

- Click the “**Select a Lookup**” button; and
- Select one of the existing Lookup records then click Select.



The image shows two screenshots from a web application. The top screenshot is the 'Create Export Declaration' form, with the 'Certifier' tab selected. The 'Lookup Name' field is empty, and a red circle highlights the 'Select a Lookup' button. A blue arrow points from this button to the bottom screenshot. The bottom screenshot is the 'Select a Certifier Lookup' dialog box, which displays a table of existing lookup records. The first record, 'Certifier John Smith', is selected with a radio button.

Create Export Declaration

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001

All fields are mandatory unless otherwise specified.

Exporter | Consignee | Service Provider | **Certifier** | Commodity | Other Export Details | Customs Details

Lookup Name 
 Select a Lookup
Mandatory if creating a lookup

Certifier Name 

Company Name 

Street Address 

Select a Certifier Lookup

Show entries Filter

Select	Lookup Name	Address	City	Province/State
<input checked="" type="radio"/>	Certifier John Smith	789 Main Street	Hamilton	Ontario
<input type="radio"/>	GENERIC CERTIFIER	CERTIFIER STREET X...	CERTIFIER CITY XXX...	Ontario
<input type="radio"/>	Manny's Certifier ...	CERTIFIER STREET X...	CERTIFIER CITY XXX...	Ontario

Showing 1 to 3 of 3 entries

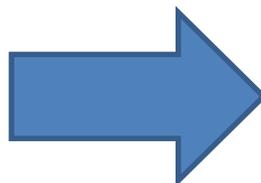
Select **Cancel**



Create Export Declaration: Lookup Feature

Result: CERS will automatically transfer the Lookup record's business data entries to the new (draft) Export Document.

Bulletins	Export Documents	Lookups	Templates	User Access
Certifier Lookup Details				
Lookup Name	Certifier John Smith			
Company name	Certifier Company Name			
Certifier name	John Smith			
Street Address	789 Main Street			
City	Hamilton			
Country	Canada			
Province/State	Ontario			
Postal/Zip Code	L6T 2M2			
Telephone Number		Telephone Extension		
(905)458-6568				
Fax Number				
Email Address	john.smith@certifiercompany.com			



Bulletins	Export Documents	Lookups	Templates	User Access		
Create Export Declaration						
Exporter Name: ABC Company Inc. Exporter Business Number: 123456789RM0001						
All fields are mandatory unless otherwise specified.						
Exporter	Consignee	Service Provider	Certifier	Commodity	Other Export Details	Customs Details
Lookup Name						
<input type="text" value="Certifier John Smith"/>						Select a Lookup
Mandatory if creating a lookup						
Certifier Name						
<input type="text" value="John Smith"/>						
Company Name						
<input type="text" value="Certifier Company Name"/>						
Street Address						
<input type="text" value="789 Main Street"/>						
City						
<input type="text" value="Hamilton"/>						
Country						
<input type="text" value="Canada"/>						
Province/State						
<input type="text" value="Ontario"/>						
Postal/Zip Code						
<input type="text" value="L6T 2M2"/>						
Telephone Number						Telephone Extension
<input type="text" value="(905)458-6568"/>						<input type="text"/>
Fax Number						
<input type="text"/>						
Email Address						
<input type="text" value="john.smith@certifiercompany.com"/>						
Use the above information to Create Certifier Lookup						
Exporter	Consignee	Service Provider	Certifier	Commodity	Other Export Details	Customs Details
Complete all mandatory fields within the tabs above.						



Create Export Declaration: Help Icon

Within the Create Export Declaration page, a user can click a Help icon (?) to obtain more information regarding a certain data field.

Bulletins | Export Documents | Lookups | Templates | User Access

Create Export Declaration

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001

All fields are mandatory unless otherwise specified.

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Business Number: 129260675RM0009 | Authorized ID: WQ6776

Lookup Name: ABC Exporter Company | Select a Lookup

Are parties related? Yes No

Exporter Name: ABC Exporter Company

Street Address: 123 Queen Street

City: Ottawa

Country: Canada

Province/State: Ontario

Postal/Zip Code: K2P 0X5

Telephone Number (optional): (613)608-8972 | Telephone Extension (optional):

Fax Number (optional):

Exporter Reference Number(s) (optional) ?

Exporter Reference Number(s)

Enter the exporter's internal reference number that will be used to trace the shipment - usually an invoice or purchase order number.

More than one exporter reference number can be entered in the field. Separate with commas or select the Enter key after each Reference Number.



Create Export Declaration: Check for Errors Feature

Within the Create Export Declaration page, a user can click the **Check for Errors** button (located at the bottom of the screen) to have CERS identify any business data validation errors present in the various sections.

The screenshot shows the 'Create Export Declaration' web form. At the top, there are navigation tabs: 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. Below these, the form title is 'Create Export Declaration'. The form contains the following fields and sections:

- Exporter Name: ABC Exporter Company
- Exporter Business Number: 123456789RM0001
- All fields are mandatory unless otherwise specified.
- Navigation tabs: Exporter, Consignee, Service Provider, Certifier, Commodity, Other Export Details, Customs Details
- Business Number: 123456789RM0001
- Authorization ID: WQ6776
- Lookup Name: (with a 'Select a Lookup' button)
- Mandatory if creating a lookup
- Are parties related?: (Radio buttons for Yes and No)
- Exporter Name: (text input)
- Street Address: (text input)
- City: (text input)
- Country: (dropdown menu)
- Province/State: (dropdown menu)
- Postal/Zip Code: (text input)
- Telephone Number (optional): (text input)
- Telephone Extension (optional): (text input)
- Fax Number (optional): (text input)
- Exporter Reference Number(s) (optional): (text area)
- Use the above information to: (with a 'Create Exporter Lookup' button)
- Navigation tabs: Exporter, Consignee, Service Provider, Certifier, Commodity, Other Export Details, Customs Details
- Complete all mandatory fields with the information above.
- Buttons: Check for Errors (circled in red), Save and Continue, Save and Finish Later, Submit to the CBSA, Cancel



Create Export Declaration: Check for Errors Feature

Examples:

- Missing mandatory data entry
- A Canadian or US address has been assigned an invalid Postal/ZIP code format

Bulletins | **Export Documents** | **Lookups** | **Templates** | **User Access**

Create Export Declaration

⚠ Your Export Document has 2 error(s). All errors must be corrected before submitting it to the CBSA.
Errors 1 - 2 of 2

- [Exporter Name is mandatory](#)
- [Exporter Postal/Zip Code is invalid](#)

[Clear Error Message\(s\)](#)

Exporter Name: ABC Exporter Company
Exporter Business Number: 123456789RM0001

All fields are mandatory unless otherwise specified.

Exporter | **Consignee** | **Service Provider** | **Certifier** | **Commodity** | **Other Export Details** | **Customs Details**

Business Number **Authorization ID**

Lookup Name [Select a Lookup](#)
Mandatory if creating a lookup

Are parties related?

Yes
 No

Exporter Name
This field is mandatory.

Street Address

City

Country

Province/State

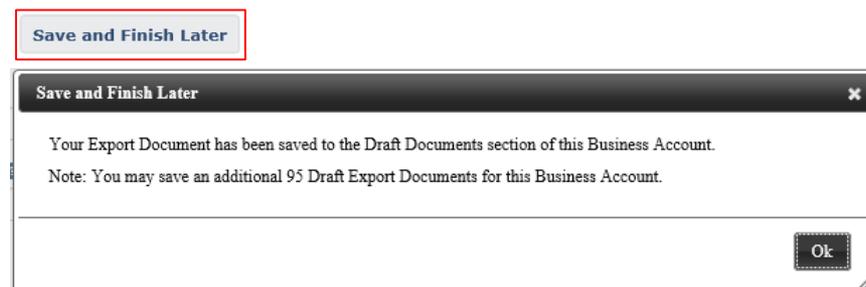
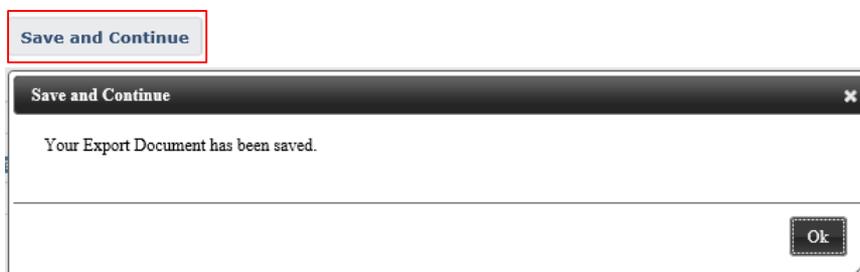
Postal/Zip Code
This field is invalid.



Create Export Declaration: Save Features

Within the Create Export Declaration page, a user can click one of two buttons to save the current, work-in-progress version of the Export Declaration as a new, “draft” Export Document:

- Click **Save and Continue** to remain within the Create Export Declaration page
- Click **Save and Finish Later** to exit the Create Export Declaration page





Create new Export Declaration: Submit to the CBSA

Within the Create Export Declaration page, a user can click the **Submit to the CBSA** button to have CERS transmit the Export Declaration to the Canada Border Services Agency.

- Following a successful submission, CERS Portal will display a confirmation page identifying the date/time of submission and the Proof of Report Number that was assigned to the submitted Export Declaration

Submit to the CBSA

Submit to the CBSA

Please verify the information below is correct:

Date of exportation: 2019-08-31

Are you sure you want to submit your Export Declaration?

CERS Portal

Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001)

Bulletins Export Documents Lookups Templates User Access

Submitted to the CBSA

Your Export Declaration has been submitted to the CBSA.

Proof of Report: **WQ6776201908302238**

Submitted Date/Time: **2019-08-30 19:14**

[Print/Download Document \(Select to view PDF size\)](#)

[Use submitted Export Declaration information to create Export Document template](#)

OK



Print/Download a Submitted Export Document (PDF)

Within the **Submitted to the CBSA** (confirmation) page, a user can click the Print/Download Document link to access a PDF file containing a printable version of the submitted Export Document.

The screenshot shows the CERS Portal interface. The main heading is "Submitted to the CBSA". Below this, it states: "Your Export Declaration has been submitted to the CBSA." followed by "Proof of Report: **WQ6776201908302238**" and "Submitted Date/Time: **2019-08-30 19:14**". A red circle highlights the link "Print/Download Document (Select to view PDF size)". A blue arrow points from this link to a file download dialog box that asks: "Do you want to open or save **ExportDeclaration.pdf** (1.03 MB) from **apps-ho1.cbsa-asfc.gc.ca?**" with buttons for "Open", "Save", "Cancel", and "x".



Print/Download a Submitted Export Document (PDF)

Sample CERS Export Declaration printout (PDF file):

ExportDeclaration.pdf - Adobe Acrobat Reader DC
File Edit View Window Help

Home Tools Document

Canada Border Services Agency / Agence des services frontaliers du Canada

Original Amended - Modifié Void - Null

Proof of report no - No de la preuve de déclaration
WQ6776201909162905

Exporter information (includes non-resident) - Renseignements sur l'exportateur (y compris les non-résidents)

Business number - Numéro d'entreprise 123456789RM0001	Authorization ID - Numéro d'autorisation WQ6776
Name - Nom EXPORTER NAME	Are parties Related? - Les parties sont-elles liées? <input type="radio"/> Yes - Oui <input checked="" type="radio"/> No - Non
Street address - Address de rue EXPORTER STREET	City - Ville OTTAWA
Province/state, country - Province/État, pays Ontario Canada	Postal/Zip code - Code postal/ZIP K2P2E6
Telephone Number - Numéro de téléphone (813)008-8972	Extension Fax Number - Numéro de télécopieur
Reference Numbers - Numéro de référence EXP REF NUMBER	

Consignee information - Renseignements sur le destination final

Name - Nom CONSIGNEE NAME	City - Ville CONSIGNEE CITY
Street address - Address de rue CONSIGNEE STREET	Province/state - Province/état
Country- Pays Canada	

Service Provider information - Renseignements sur le fournisseur de service

Service Provider Name - Nom du fournisseur de service	Authorization ID - No d'autorisation
Street address - Address de rue	City - Ville
Province/state, country - Province/État, pays	Postal/Zip code - Code postal/ZIP
Telephone Number - Numéro de téléphone	Extension

Certifier information - Renseignements sur le Certifieur

Certifier Name - Nom du certifieur CERTIFIER NAME	E-mail Address - Courriel CERTIFIER@HOTMAIL.COM
Company Name - Nom de l'entreprise CERTIFIER COMPANY	City - Ville CERTIFIER CITY
Street address - Address de rue CERTIFIER STREET	Postal/Zip code - Code postal/ZIP K2P0X5
Province/state, country - Province/État, pays Ontario Canada	Telephone Number - Numéro de téléphone (813)008-8972
Extension	Fax Number - Numéro de télécopieur

Canada

1 of 2



Save a Submitted Export Document as a Template

Within the **Submitted to the CBSA** (confirmation) page, a user can click the **“Use submitted ... information to create Export Document template”** link to save the submitted Export Document’s business data entries to a new **Template** record. This Template can be used in the future to quickly create a new, draft Export Document.

The screenshot displays the CBSA web interface. At the top, there are tabs for 'Business Accounts' and 'My Profile'. Below this, a breadcrumb trail shows 'Home > Business Accounts' followed by the account name 'ABC Company Inc. (123456789RM0001)'. A navigation bar contains links for 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The main content area is titled 'Submitted to the CBSA' and contains the following text: 'Your Export Declaration has been submitted to the CBSA.', 'Proof of Report: **WQ6776201908302238**', and 'Submitted Date/Time: **2019-08-30 19:14**'. Below this, there is a link 'Print/Download Document (Select to view PDF size)'. A blue arrow points from the link 'Use submitted Export Declaration information to create Export Document template' to a notification window. The notification window is titled 'New Template Created' and contains the message 'A new Export Document Template has been created.' with an 'Ok' button.



5. Managing Submitted Export Documents

- Submitted Documents section
 - Submitted Documents table
 - Status History
 - Search features (Filter textbox; Search Submitted Export Documents button)
- Viewing a submitted Export Document
- Voiding a submitted Export Document
- Amending a submitted Export Document

Export Documents: Submitted Documents Tab

Within the Export Documents section, select the **Submitted Documents** tab to view a table identifying Export Declarations or Summary Reports that were submitted to the CBSA.

- In addition to original Export Document submissions, this table also contains entries for amended and voided documents

The screenshot shows the CERS Portal interface. The user is logged in as John Smith (URN: MO547939) for ABC Company Inc. (123456789RM0001). The 'Export Documents' section is active, and the 'Submitted Documents' tab is selected. The table below lists 16 entries of export documents.

Proof of Report	Date of exportation	Submitted Date/Time	Status
WQ6776201909162905	2019-09-17	2019-09-16 16:53	Voided
WQ6776201909162904	2019-09-16	2019-09-16 16:42	Amended
WQ6776201909132894	2019-09-13	2019-09-13 16:07	Original
WQ6776201909132892	2019-09-13	2019-09-13 15:52	Original
WQ6776201909062828	2019-09-05	2019-09-06 11:56	Original
WQ6776201909062827	2019-09-05	2019-09-06 11:55	Original
WQ6776201909062826	2019-09-05	2019-09-06 11:55	Original
WQ6776201909062824	2019-09-07	2019-09-06 11:34	Amended
WQ6776201909062813	2019-09-13	2019-09-06 09:43	Original
WQ6776201909042308	2019-09-04	2019-09-04 12:00	Original

Showing 1 to 10 of 16 entries



Export Documents: Submitted Documents Tab

By default, the Submitted Documents section will display a list of submitted Export Declarations. To view a list of submitted **Summary Reports**, change the setting for the Export Document Type drop-down menu then click the Refresh button.

The screenshot shows the 'Export Documents' interface with the 'Submitted Documents' tab selected. The 'Select Export Document Type' dropdown is set to 'Summary Report' and the 'Refresh' button is highlighted with a red circle. The table below displays a list of submitted documents.

Proof of Report	Reporting Period	Submitted Date/Time	Status
SUM6519WQ6776201911	201911	2019-11-04 18:41	Original
SUM6519WQ6776201910	201910	2019-10-30 08:48	Original
SUM6519WQ6776201909	201909	2019-09-26 18:16	Amended
SUM6519WQ6776201908	201908	2019-09-04 17:43	Voided



Export Documents: Submitted Documents Tab

The list of Submitted Documents will display up to 500 of the most recent submissions completed within the past 180 days.

- If your company submits a large number of export documents to the CBSA or needs to locate an older declaration, use the **Search Submitted Export Documents** feature to locate the document based on its Export Proof of Report Number

The screenshot shows the 'Export Documents' web application interface. At the top, there are navigation tabs: 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. Below this is the 'Export Document' section, which includes a 'Create Export Document' button and a 'Search Submitted Export Documents' button. The 'Submitted Documents' tab is selected, and there is a 'Bulk Upload' button. A dropdown menu for 'Select Export Document Type' is set to 'Export Declaration', with a 'Refresh' button next to it. Below this, there is a 'Show 10 entries' dropdown and a 'Filter' input field. The main content is a table with the following columns: 'Proof of Report', 'Date of exportation', 'Submitted Date/Time', and 'Status'. The table contains 10 rows of data, all with a status of 'Original'. At the bottom, there is a pagination bar showing 'Showing 1 to 10 of 500 entries' and a page navigation bar with buttons for '1', '2', '3', '4', '5', '50', and 'Next'.

Proof of Report	Date of exportation	Submitted Date/Time	Status
WQ6776201912085221	2019-12-08	2019-12-08 17:51	Original
WQ6776201912085220	2019-12-08	2019-12-08 17:51	Original
WQ6776201912085219	2019-12-08	2019-12-08 17:51	Original
WQ6776201912085218	2019-12-08	2019-12-08 17:51	Original
WQ6776201912085217	2019-12-08	2019-12-08 17:51	Original
WQ6776201912085216	2019-12-08	2019-12-08 17:51	Original
WQ6776201912085215	2019-12-08	2019-12-08 17:51	Original
WQ6776201912085214	2019-12-08	2019-12-08 17:51	Original
WQ6776201912085213	2019-12-08	2019-12-08 17:51	Original
WQ6776201912085212	2019-12-08	2019-12-08 17:51	Original



Submitted Documents: Status History

Within the Submitted Documents table, a user can click a Status link to view the full “Status History” for an Export Document.

Bulletins | Export Documents | Lookups | Templates | User Access

Export Document

Create Export Document Search Submitted Export Documents

Draft Documents | Submitted Documents | Bulk Upload

Select Export Document Type: Export Declaration

Show 10 entries Filter

Proof of Report	Date of exportation	Submitted Date/Time	Status
WQ6776201909162905	2019-09-17	2019-09-16 16:53	Voided
WQ6776201909162904	2019-09-16	2019-09-16 16:42	Amended
WQ6776201909132894	2019-09-13	2019-09-13 16:07	

Bulletins | Export Documents | Lookups | Templates | User Access

Status History

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001
Document Type: Export Declaration
Proof of Report: WQ6776201909162905

Show 10 entries

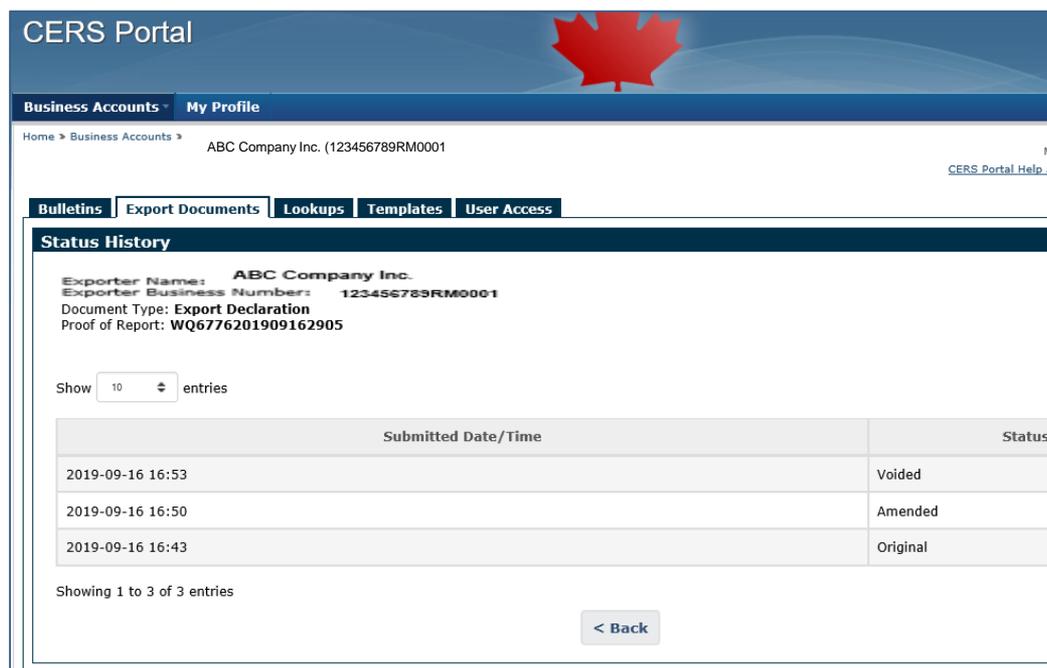
Submitted Date/Time	Status
2019-09-16 16:53	Voided
2019-09-16 16:50	Amended
2019-09-16 16:43	Original

Showing 1 to 3 of 3 entries

Status History

The **Status History** page will display information regarding past reporting events, such as:

- **(Original submission)**
The date/time when the Export Document was first submitted to the CBSA
- The date/time when the Export Document was **Amended** (i.e. New version submitted to the CBSA)
- The date/time when the Export Document was **Voided** (i.e. Cancellation request)



The screenshot shows the CERS Portal interface. At the top, there is a blue header with the text "CERS Portal" and a red maple leaf logo. Below the header, there are navigation tabs: "Business Accounts", "My Profile", "Bulletins", "Export Documents", "Lookups", "Templates", and "User Access". The "Export Documents" tab is selected. The main content area displays the "Status History" for "ABC Company Inc." with the following details:

- Exporter Name: ABC Company Inc.
- Exporter Business Number: 123456789RM0001
- Document Type: Export Declaration
- Proof of Report: WQ6776201909162905

Below the details, there is a "Show" dropdown menu set to "10" entries. A table displays the status history:

Submitted Date/Time	Status
2019-09-16 16:53	Voided
2019-09-16 16:50	Amended
2019-09-16 16:43	Original

At the bottom of the table, it says "Showing 1 to 3 of 3 entries" and there is a "< Back" button.



Submitted Documents: Search Features

Search Feature 1:

Within the Submitted Documents tab, a user can enter data into the **Filter** text box to prompt CERS to display only those Export Documents possessing a particular entry value for Proof of Report Number, Date of exportation, Submission date/time, and/or Status.

The screenshot shows the CERS Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, the user's name 'John Smith' and URN 'MO547939' are displayed. The main content area is titled 'Export Document' and contains a 'Submitted Documents' tab. A search filter box is highlighted with a red circle. Below the filter box is a table of submitted documents.

Proof of Report	Date of exportation	Submitted Date/Time	Status
WQ6776201909162905	2019-09-17	2019-09-16 16:53	Voided
WQ6776201909162904	2019-09-16	2019-09-16 16:42	Amended
WQ6776201909132894	2019-09-13	2019-09-13 16:07	Original
WQ6776201909132892	2019-09-13	2019-09-13 15:52	Original
WQ6776201909062828	2019-09-05	2019-09-06 11:56	Original
WQ6776201909062827	2019-09-05	2019-09-06 11:55	Original



Submitted Documents: Search Features

- **Filter Example:** Export Proof of Report contains “201908”

Business Accounts ▾ My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001) John Smith (URN: MO547939)
[CERS Portal Help and Support](#) | [Log out](#)

Bulletins | **Export Documents** | **Lookups** | **Templates** | **User Access**

Export Document

[Create Export Document](#) | [Search Submitted Export Documents](#)

Draft Documents | **Submitted Documents** | **Bulk Upload**

Select Export Document Type: [Refresh](#)

Show entries Filter

Proof of Report	Date of exportation	Submitted Date/Time	Status
WQ6776201908302241	2019-08-30	2019-08-30 19:54	Original
WQ6776201908302239	2019-08-31	2019-08-30 19:43	Original
WQ6776201908302237	2019-08-30	2019-08-30 19:37	Amended
WQ6776201908302238	2019-08-31	2019-08-30 19:31	Voided
WQ6776201908282192	2019-08-28	2019-08-30 14:21	Amended

Showing 1 to 5 of 5 entries (filtered from 16 total entries) 1



Submitted Documents: Search Features

- **Filter Example:** Date of Exportation contains “2019-08”

Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001) John Smith (URN: MO547939)
[CERS Portal Help and Support](#) | [Log out](#)

Bulletins | **Export Documents** | Lookups | Templates | User Access

Export Document

[Create Export Document](#) [Search Submitted Export Documents](#)

Draft Documents | Submitted Documents | **Bulk Upload**

Select Export Document Type: [Refresh](#)

Show entries Filter

Proof of Report	Date of exportation	Submitted Date/Time	Status
WQ6776201908302241	2019-08-30	2019-08-30 19:54	Original
WQ6776201908302239	2019-08-31	2019-08-30 19:43	Original
WQ6776201908302237	2019-08-30	2019-08-30 19:37	Amended
WQ6776201908302238	2019-08-31	2019-08-30 19:31	Voided
WQ6776201908282192	2019-08-28	2019-08-30 14:21	Amended

Showing 1 to 5 of 5 entries (filtered from 16 total entries) 1



Submitted Documents: Search Features

Note that the Filter feature will perform a keyword search among all four fields.

- **Example:** When performing a keyword search for “06”, CERS found the following results:
 - 1) One Export Document in which the Proof of Report Number contains “06”
 - 2) Five Export Documents in which the Submitted Date/Time contains “06”
 - 3) One Export Document in which the Date of Exportation contains “06”

The screenshot shows the 'Export Document' search interface. At the top, there are navigation tabs: 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. Below these, there are buttons for 'Create Export Document' and 'Search Submitted Export Documents'. The 'Submitted Documents' tab is active. A dropdown menu shows 'Export Declaration' selected, with a 'Refresh' button next to it. A search filter is set to '06'. The results table has four columns: 'Proof of Report', 'Date of exportation', 'Submitted Date/Time', and 'Status'. The table contains 7 rows of data. At the bottom, it says 'Showing 1 to 7 of 7 entries (filtered from 18 total entries)' and a page number '1' is visible in a blue box.

Proof of Report	Date of exportation	Submitted Date/Time	Status
WQ6776201909162906	2019-09-16	2019-09-16 17:24	Original
WQ6776201909062828	2019-09-05	2019-09-06 11:56	Original
WQ6776201909062827	2019-09-05	2019-09-06 11:55	Original
WQ6776201909062826	2019-09-05	2019-09-06 11:55	Original
WQ6776201909062824	2019-09-07	2019-09-06 11:34	Amended
WQ6776201909062813	2019-09-13	2019-09-06 09:43	Original
WQ6776201909032275	2019-09-06	2019-09-03 10:08	Original



Submitted Documents: Search Features

Search Feature 2:

Within the Submitted Documents tab, a user can click the **Search Submitted Export Documents** button to initiate a precise search for a particular Export Declaration or Summary Report possessing a certain Proof of Report Number.

The image illustrates the search feature for submitted documents in a web application. It consists of three overlapping screenshots:

- Top-left screenshot:** Shows the 'Export Document' page with the 'Submitted Documents' tab selected. The 'Search Submitted Export Documents' button is circled in red.
- Middle screenshot:** Shows a modal window titled 'Search Submitted Export Documents'. It includes a 'Document Type' dropdown menu (set to 'Export Declaration') and a 'Proof of Report' text input field containing 'WQ6776201908282192'. The 'Search' button is circled in red.
- Bottom-right screenshot:** Shows the 'View Submitted Export Declaration' page. It displays the following details:
 - Exporter Name: ABC Company Inc.
 - Exporter Business Number: 123456789RM0001
 - Proof of Report: WQ6776201908282192
 - Submitted Date/Time: 2019-08-30 14:21
 - Status: AmendedBelow this, there is a table with columns: Exporter, Consignee, Service Provider, Certifier, Commodity, Other Export Details, and Customs Details. The 'Business Number' is 123456789RM0001 and the 'Authorized ID' is WQ6776.



Search Feature 2: Note regarding CAED Proof of Report Number

CBSA has migrated CAED export declaration submissions completed from December 1, 2017 to present day to CERS Portal.

- The **Search Submitted Export Documents** feature can be used to retrieve and view a CAED export document
- A user has the ability to **void** a CAED export document, provided it had been submitted within the past 90 days

The screenshot displays the 'View Submitted Export Declaration' page in the CERS Portal. The page includes a navigation menu at the top with options: Bulletins, Export Documents, Lookups, Templates, and User Access. The main content area shows the following details:

- Exporter Name: ABC EXPORTERS INC
- Exporter Business Number: 123456789RM0001
- Proof of Report: 05X222SC12342019-12-00006
- Submitted Date/Time: 2019-12-20 16:19
- Status: Amended

Below this information is a tabbed interface with the following tabs: Exporter, Consignee, Service Provider, Certifier, Commodity, Other Export Details, and Customs Details. The 'Exporter' tab is currently selected, showing the following details:

- Business Number: 123456789RM0001
- Authorization ID: SC1234
- Exporter Name: ABC EXPORTERS INC
- Street Address: 123 Main Street
- City: Ottawa
- Country: Canada
- Province/State: Ontario
- Postal/Zip Code: K2P0X5
- Telephone Number: (613) 608-8972
- Telephone Extension: (empty)
- Fax Number: (empty)
- Exporter Reference Number(s): (empty text box)

At the bottom of the page, there is a navigation bar with the same tabs as above, and a footer with the text 'Print/Download Document (Select to view PDF size)'. Below the footer are three buttons: Amend, Void, and < Back.



Search Feature 2: Note regarding CAED Proof of Report Number

Within CBSA's IT systems, the CAED Proof of Report Number gets re-formatted in the following manner:

- i. A hyphen (-) is added to the end of the YEAR component
- ii. A hyphen (-) is added to the end of the MONTH component

Example:

CAED Proof of Report Number 05X222SC123420191200006 is stored within CBSA's IT systems as **05X222SC12342019-12-00006**



Search Feature 2: Note regarding CAED Proof of Report Number

When using the **Search Submitted Export Documents** page, make sure to enter the CAED Export Proof of Report Number using CBSA's formatting convention (i.e. Add hyphens to the end of the YEAR and MONTH components).

The screenshot shows the 'Export Document' page with a navigation bar containing 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. Below the navigation bar, there are buttons for 'Create Export Document' and 'Search Submitted Export Documents'. The 'Search Submitted Export Documents' button is circled in red. Below the buttons, there are tabs for 'Draft Documents', 'Submitted Documents', and 'Bulk Upload'. A dropdown menu for 'Select Export Document Type' is set to 'Export Declaration' with a 'Refresh' button. A 'Show' dropdown is set to '10' entries. Below this is a table with columns 'Proof of Report', 'Date of exportation', and 'Submitted Date/T'. The table contains one row with the following data:

Proof of Report	Date of exportation	Submitted Date/T
WQ6776202001065301	2019-12-16	2020-01-06 08:27

Example:

Conduct a search for CAED
Proof of Report Number
05X222SC12342019-12-00006

The screenshot shows the 'Search Submitted Export Documents' search form. It has a navigation bar with 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The form title is 'Search Submitted Export Documents'. There is a 'Document Type' dropdown menu set to 'Export Declaration'. Below it is a 'Proof of Report' text input field containing the example number '05X222SC12342019-12-00006'. At the bottom right, there are 'Search' and 'Cancel' buttons.



View Submitted Export Document

Within the Submitted Documents tab, a user can click a Proof of Report link in order to view the information included in the submitted Export Document.

Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001)

Bulletins Export Documents Lookups Templates User Access

Export Document

Create Export Document Search Submitted Export Documents

Draft Documents Submitted Documents Bulk Upload

Select Export Document Type Export Declaration Refresh

Show 10 entries Filter

Proof of Report	Date of exportation	Submitted Date/Time
WQ6776201908302238	2019-08-31	2019-08-30 19:14
WQ6776201908302237	2019-08-30	2019-08-30 14:56
WQ6776201908282192	2019-08-28	2019-08-30 14:21

Showing 1 to 3 of 3 entries

Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001)

Bulletins Export Documents Lookups Templates User Access

View Submitted Export Declaration

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001
Proof of Report: WQ6776201908302238
Submitted Date/Time: 2019-08-30 19:14
Status: Original

Exporter Consignee Service Provider Certifier Commodity Other Export Details Customs Details

Business Number 129260675RM0009 **Authorized ID** WQ6776
An 123456789RM0001
No No
Exporter Name ABC Exporter Company
Street Address 123 Queen Street
City Ottawa
Country Canada
Province/State Ontario
Postal/Zip Code K2P0X5



View Submitted Export Document

While viewing a submitted export document, a user can click a **Print/Download** link in order to view the document within a PDF file.

The screenshot displays the 'View Submitted Export Declaration' web interface. The interface includes a navigation menu at the top with options: **Bulletins**, **Export Documents**, **Lookups**, **Templates**, and **User Access**. The main content area shows the following details:

- Exporter Name: **ABC Company Inc.**
- Exporter Business Number: **123456789RM0001**
- Proof of Report: **WQ6776201908302238**
- Submitted Date/Time: **2019-08-30 19:31**
- Status: **Original**

Below this information is a tabbed interface with the following tabs: **Exporter**, **Consignee**, **Service Provider**, **Certifier**, and **Comments**. The **Exporter** tab is active, showing the following details:

- Business Number:** 123456789RM0001
- Authorization ID:** WQ6776
- Are parties related?:** No
- Exporter Name:** ABC Exporter Company
- Street Address:** 123 Queen Street
- City:** Ottawa
- Country:** Canada
- Province/State:** Ontario
- Postal/Zip Code:** K2P0X5
- Telephone Number:** (613)608-8972
- Telephone Extension:** [Blank]
- Fax Number:** [Blank]
- Exporter Reference Number(s):** [Text input field]

At the bottom of the interface, there is a navigation bar with tabs: **Exporter**, **Consignee**, **Service Provider**, **Certifier**, **Comments**, **Print/Download Document (Select to view PDF size)**, and **Customs Details**. The **Print/Download Document (Select to view PDF size)** link is circled in red.

Overlaid on the right side of the interface is an Adobe Acrobat Reader window titled 'ExportDeclaration.pdf - Adobe Acrobat Reader 2017'. The window shows the PDF document with the following content:

- Header: **CERS EXPORT DECLARATION DÉCLARATION D'EXPORTATION SCDE**
- Proof of Report - Preuve de déclaration: **WQ6776201908302238**
- Form fields for **Exporter Information - Renseignements sur l'exportateur** and **Consignee Information - Renseignements sur le destinataire**.



Follow-up Reporting Options (Amend or Void)

When viewing a submitted Export Document, a user could choose to initiate a follow-up reporting action:

- A user could submit an updated version of the Export Document to the CBSA (**Amend**); or
- A user could submit a cancellation request to the CBSA (**Void**).

Bulletins | Export Documents | Lookups | Templates | User Access

View Submitted Export Declaration

Exporter Name: **ABC Company Inc.**
Exporter Business Number: **123456789RM0001**
Proof of Report: **WQ6776201909162906**
Submitted Date/Time: **2019-09-16 17:24**
Status: **Original**

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Business Number 123456789RM0001 **Authorized ID** WQ6776

Are parties related? No

Exporter Name EXPORTER NAME

Street Address EXPORTER STREET

City OTTAWA

Country Canada

Province/State Ontario

Postal/Zip Code K2P2E6

Telephone Number (613)608-8972 **Telephone Extension**

Fax Number

Exporter Reference Number(s)
EXP REF NUMBER

Print/Download Document (Select to view PDF size)

Amend **Void** < Back

Use submitted Export Declaration information to create Export Document template



Amending an Export Document

A user can submit an **Amend** request to provide the CBSA with an updated version of an existing Export Document.

- When viewing a submitted Export Document, click the **Amend** button to have CERS display an editable version of the document

Business Accounts > My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001)

Bulletins | Export Documents | Lookups | Templates | User Access

View Submitted Export Declaration

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001
Proof of Report: WQ6776201908302237
Submitted Date/Time: 2019-08-30 14:56
Status: Original

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Business Number	Authorized ID
129260675RM0009	WQ6776

Are parties related?
No

Exporter Name
EXPORTER NAME
XX
XXX70

Amend

Bulletins | Export Documents | Lookups | Templates | User Access

Amend Export Declaration

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001
Proof of Report: WQ6776201908302237
Submitted Date/Time: 2019-08-30 14:56
Status: Original

All fields are mandatory unless otherwise specified.

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Business Number	Authorized ID
129260675RM0009	WQ6776

Lookup Name

[Select a Lookup](#)

Mandatory if creating a lookup

Are parties related?

Yes
 No

Exporter Name

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Complete all mandatory fields within the tabs above.

[Check for Errors](#) [Resubmit to CBSA](#)

[Print/Download Document \(Select to view PDF size\)](#) [Cancel](#)



Amending an Export Document

Note: When submitting an amended Export Document to the CBSA, the user will be required to select an Amendment Reason to specify why it was necessary to update the existing Export Document.

Bulletins | **Export Documents** | **Lookups** | **Templates** | **User Access**

Select Reason For Amendment

Note: When submitting an amendment, you must select only one reason for the amendment. The amendments are listed in order of priority. When more than one reason applies to a single amendment, use only the reason that is closest to the top of the list below.

Select	Amend Reason
<input type="radio"/>	Addition of or change in export permit/licence/certificate number
<input type="radio"/>	Change in carrier and/or cargo control number
<input type="radio"/>	Change in country of final destination and/or ultimate consignee information
<input type="radio"/>	Change in date of export
<input type="radio"/>	Change in description of goods (including quantity, country of origin, value, HS code)
<input type="radio"/>	Change in line items within the declaration (addition or removal of line items)
<input type="radio"/>	Change in place of export
<input type="radio"/>	Goods no longer being exported from Canada
<input type="radio"/>	Reason not listed above

Bulletins | **Export Documents** | **Lookups** | **Templates** | **User Access**

Resubmit to CBSA

Your Export Declaration has been submitted to the CBSA.

Proof of Report: **WQ6776201908302237**
Submitted Date/Time: **2019-08-30 19:37**

[Print/Download Document \(Select to view PDF size\)](#)



Amending an Export Document

From the Submitted Documents section, a user can access the Status History page to confirm that a particular Export Document has been amended.

Export Document

[Create Export Document](#) [Search Submitted Export Documents](#)

[Draft Documents](#) [Submitted Documents](#) [Bulk Upload](#)

Select Export Document Type: [Refresh](#)

Show entries Filter

Proof of Report	Date of exportation	Submitted Date/Time	Status
WQ6776201908302239	2019-08-31	2019-08-30 19:43	Original
WQ6776201908302237	2019-08-30	2019-08-30 19:37	Amended

Status History

Exporter Name: ABC Company Inc.)
Exporter Business Number: 123456789RM0001
Document Type: Export Declaration
Proof of Report: WQ6776201908302237

Show entries

Submitted Date/Time	Status
2019-08-30 19:37	Amended
2019-08-30 14:56	Original

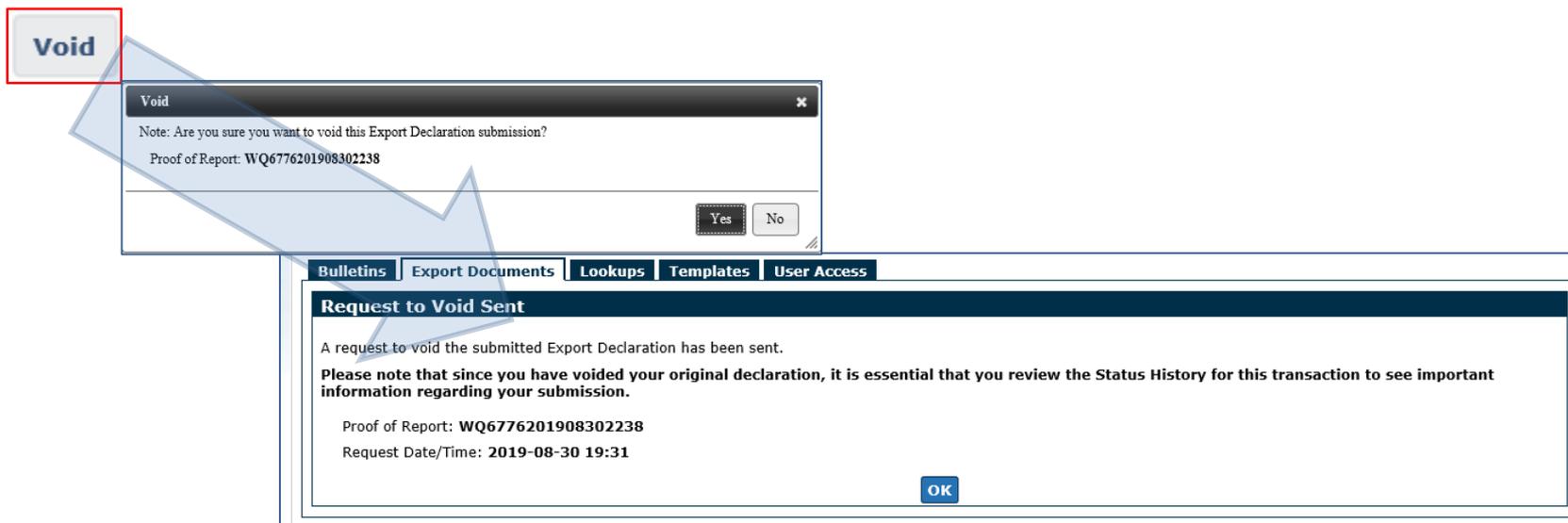
Showing 1 to 2 of 2 entries 1

[< Back](#)

Voiding an Export Document

A user can submit a **Void** request to have the CBSA cancel/void an existing Export Document submission.

- **Note:** As per Memorandum D20-1-1 (Exporter Reporting), the exporter is liable for ensuring that commercial goods being exported from Canada are reported to the CBSA within prescribed timeframes. An Export Document should only be voided for the purposes of correcting a reporting error.



The screenshot illustrates the process of voiding an export document. A red box highlights the 'Void' button in the top left corner. A blue arrow points from this button to a 'Void' dialog box. The dialog box contains the following text:

Void
Note: Are you sure you want to void this Export Declaration submission?
Proof of Report: WQ6776201908302238
Yes No

Below the dialog box, a 'Request to Void Sent' confirmation message is displayed in a blue-bordered box. The message includes the following information:

Request to Void Sent
A request to void the submitted Export Declaration has been sent.
Please note that since you have voided your original declaration, it is essential that you review the Status History for this transaction to see important information regarding your submission.
Proof of Report: **WQ6776201908302238**
Request Date/Time: **2019-08-30 19:31**
OK



Voiding an Export Document

From the Submitted Documents section, a user can access the Status History page to confirm that a particular Export Document has been voided.

The screenshot displays the 'Export Document' interface. The top navigation bar includes 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The main section is titled 'Export Document' and contains a 'Submitted Documents' tab. A table lists three export documents with columns for 'Proof of Report', 'Date of exportation', 'Submitted Date/Time', and 'Status'. The status 'Voided' for the first document is circled in red. An arrow points from this status to a 'Status History' page for the same document. The 'Status History' page shows a list of status changes, including 'Voided' and 'Original'.

Proof of Report	Date of exportation	Submitted Date/Time	Status
WQ6776201908302238	2019-08-31	2019-08-30 19:31	Voided
WQ6776201908302237	2019-08-30	2019-08-30 14:56	Original
WQ6776201908282192	2019-08-28	2019-08-30 14:21	Amended

Submitted Date/Time	Status
2019-08-30 19:31	Voided
2019-08-30 19:14	Original



6. Managing Draft Export Documents

- Draft Documents section
- Deleting a draft Export Document
- Updating a draft Export Document



Draft Documents Section

The **Draft Documents** tab acts as the storage location for all draft Export Documents (i.e. Export Declarations and Summary Reports).

- When creating a new Export Document in CERS, a user can click the “Save and Continue” or “Save and Exit” button to have the current, work-in-progress version of the document saved to the CERS Business Account’s Draft Documents tab

Export Documents [Create Export Document](#)

Draft Documents Submitted Documents Bulk Upload

Note: You may save an additional 96 Draft Export Documents for this Business Account.

Show 10 entries Filter

Draft Document Name	Document Type	Saved Date/Time	Action
FA062895-20190830	Export Declaration	2019-08-30 15:15	Delete
FA062895-20190830	Export Declaration	2019-08-30 15:14	Delete
MO547939-20190828	Export Declaration	2019-08-28 11:07	Delete
MO547939-201981	Summary Report	2019-08-01 17:54	Delete

Showing 1 to 4 of 4 entries 1



Deleting a Draft Export Document

Within the Draft Documents tab, a user can click a Delete button to permanently remove a draft Export Document from the CERS Business Account.

The screenshot shows the CERS Business Accounts interface. The user is logged in as John Smith (URN: MO547939). The 'Export Documents' tab is active, and the 'Draft Documents' sub-tab is selected. A table displays the following draft documents:

Draft Document Name	Document Type	Saved Date/Time	Action
FA062895-20190830	Export Declaration	2019-08-30 15:15	Delete
FA062895-20190830	Export Declaration	2019-08-30 15:14	Delete
MO547939-20190828	Export Declaration	2019-08-28 11:07	Delete
MO547939-201981	Summary Report	2019-08-01 17:54	Delete

A red circle highlights the 'Delete' button for the first document, and a blue arrow points to a confirmation dialog box titled 'Delete Draft Export Document'. The dialog box contains the text: 'Are you sure you want to permanently delete this Draft Export Document?' and 'Yes' and 'No' buttons.



Resuming Work on a Draft Export Document

Within the Draft Documents section, a user can click a Draft Document Name link to have CERS display the chosen document within a Create Export Document page.

- The user will be able to resume assigning business data entries to the draft Export Document. Once completed, the draft document could then be submitted to the CBSA.

Draft Document Name	Document Type
FA062895-20190830	Export Declaration

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001

All fields are mandatory unless otherwise specified.

Business Number: 129260675RM0009
Authorized ID: WQ6776

Lookup Name: [Text Field] [Select a Lookup]

Mandatory if creating a lookup

Are parties related? Yes No

Complete all mandatory fields within the tabs above.

[Check for Errors] [Save and Continue] [Save and Finish Later] [Submit to the CBSA]

[Print/Download Document (Select to view PDF size)] [Delete...] [Cancel]



7. Managing Lookups

- Lookups section
- Lookup records
 - Trade Chain Partners, HS Codes, Summary Report Lines
- Viewing, Deleting, and Editing Lookup records



Lookups Section

The **Lookups** tab acts as the storage location for all Lookup records.

- When creating a new (draft) Export Document, a user has the option of saving certain business data entries as a “Lookup” record so that the information can be retrieved and assigned to subsequent new Export Declarations

The screenshot shows the 'Lookups' section of a web application. The 'Lookups' tab is highlighted with a red circle. Below the navigation tabs, there is a 'Create Certifier Lookup' button, a 'Show 10 entries' dropdown, and a 'Filter' input field. A table displays three lookup records with columns for Lookup Name, Address, City, and Province/State.

Lookup Name	Address	City	Province/State
Certifier John Smith	789 Main Street	Hamilton	Ontario
GENERIC CERTIFIER	CERTIFIER STREET X...	CERTIFIER CITY XXX...	Ontario
Manny's Certifier ...	CERTIFIER STREET X...	CERTIFIER CITY XXX...	Ontario

Showing 1 to 3 of 3 entries



Lookup Records for Trade Chain Partners

The Lookup records are organized based on their subject matter:

- Exporter, Consignee, Service Provider, and Certifier Lookup records contain name and address information for certain trade chain partners

Sample Certifier Lookup Record

CERS Portal

Business Accounts | My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001) John Smith

Bulletins | Export Documents | Lookups | Templates | User Access

Lookups

Exporter | Consignee | Service Provider | **Certifier** | HS Code | Summary Report Line

Create Certifier Lookup

Show 10 entries Filter

Lookup Name	Address	City	Province/State
Certifier John Smith	789 Main Street	Hamilton	Ontario
GENESIS CERTIFIER	CERTIFIER STREET X...	CERTIFIER CITY XXX...	Ontario
Manny's Certifier...	CERTIFIER STREET X...	CERTIFIER CITY XXX...	Ontario

Showing 1 to 3 of 3 entries

Bulletins | Export Documents | **Lookups** | Templates | User Access

Certifier Lookup Details

Lookup Name
Certifier John Smith

Company name
Certifier Company Name

Certifier name
John Smith

Street Address
789 Main Street

City
Hamilton

Country
Canada

Province/State
Ontario

Postal/Zip Code
L6T 2M2

Telephone Number (905)458-6568 **Telephone Extension**

Fax Number

Email Address
john.smith@certifiercompany.com

Edit Delete < Back



Lookup Records for Trade Chain Partners

A CERS Business Account can be assigned up to **1000** Lookup records of each type. (Examples: Maximum 1000 Exporter Lookup records; Maximum 1000 Consignee Lookup records; ...)

Bulletins | Export Documents | **Lookups** | Templates | User Access

Lookups

Exporter | **Consignee** | Service Provider | Certifier | HS Code | Summary Report Line

Create Exporter Lookup

Show 10 entries Filter

Lookup Name	Address	City	Province/State
Exporter 110	110 Queen St	Kingston	Ontario
GENERIC EXPORTER	EXPORTER STREET XX...	EXPORTER CITY XXXX...	Ontario

Showing 1 to 2 of 2 entries

Bulletins | Export Documents | **Lookups** | Templates | User Access

Lookups

Exporter | **Consignee** | Service Provider | Certifier | HS Code | Summary Report Line

Create Consignee Lookup

Show 10 entries Filter

Lookup Name	Address	City	Province/State
DEFG Corporation	101 Main Street	London	
GENERIC CONSIGNEE	CONSIGNEE STREET X...	CONSIGNEE CITY XXX...	LEHAVRE
Manny's Consignee ...	456 Queen Street	Manilla	

Showing 1 to 3 of 3 entries



Lookup Records for HS Codes

- HS Code Lookup records contain an 8-digit Export HS Code (based on Statistics Canada's Export Classification system) and a user-based description of the commodity being exported from Canada.

CERS Portal

Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001) John Smith (URN: M0547939) CERS Portal Help and Support | Log out

Bulletins Export Documents Lookups Templates User Access

Lookups

Exporter Consignee Service Provider Certifier HS Code Summary Report Line

Create HS Code Lookup

Show 10 entries Filter

HSB Code	Official Description	Your Description	Unit of measure
4403.11.10	Poles f tel/telegraph/elec lines, coniferous, treat w paint/stains/creosote/etc	Wooden Telephone Poles	Metre
4403.21.90	Logs, of pine, of which any cross-sectional dimension >= 15 cm, not treated, nes	PRODUCT DESCRIPTION XX...	Cubic Metre

Showing 1 to 2 of 2 entries

CERS Portal

Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001)

Bulletins Export Documents Lookups Templates User Access

HS Code Lookup Details

HS Code: 4403.11.10

Official Description:
Poles f tel/telegraph/elec lines, coniferous, treat w paint/stains/creosote/etc

Your Description:
Wooden Telephone Poles

Unit Of Measure: Metre

Edit Delete < Back

Lookup Records for Summary Report Lines

- Summary Report (SR) Line Lookup records contain information regarding an SR commodity line item entry (e.g. Export HS Code, user-based cargo description, country of final destination, etc). These Lookup records can be used to transfer commodity line entries to a new (draft) Summary Report.

Lookups

Exporter | Consignee | Service Provider | Certifier | HS Code | Summary Report Line

Show 10 entries Filter

Lookup Name	HSB Code	Place of Exit	Country of final destination
John's Summary Rep...	4403.21.20	Montréal	Japan
SR COMMODITY LOOKUP	4403.21.20	Montréal	China

Showing 1 to 2 of 2 entries

Summary Report Line Lookup Details

Lookup Name: SR COMMODITY LOOKUP

Harmonized System

HS Commodity code
4403.21.20

Your Description
WOODEN TELEPHONE POLES (PINE)

Unit of measure
Metre

Destination

Place of Exit
Montréal

Country of final destination
China

Origin

Country
Canada

Province
Ontario

Other

Mode of Transport
Marine

Edit Delete < Back



Viewing a Lookup Record

To view a Lookup record:

- 1) Access the Lookups section;
- 2) Select the Lookup tab of interest (e.g. Certifier);
- 3) Click the link provided for the name of the Lookup record.

CERS Portal

Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001) John Smith

Bulletins Export Documents **Lookups** Templates User Access

Lookups

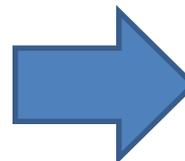
Exporter Consignee Service Provider **Certifier** HS Code Summary Report Line

Create Certifier Lookup

Show 10 entries Filter

Lookup Name	Address	City	Province/State
Certifier John Smith	789 Main Street	Hamilton	Ontario
GENERIC CERTIFIER	CERTIFIER STREET X...	CERTIFIER CITY XXX...	Ontario
Manny's Certifier ...	CERTIFIER STREET X...	CERTIFIER CITY XXX...	Ontario

Showing 1 to 3 of 3 entries



Bulletins Export Documents **Lookups** Templates User Access

Certifier Lookup Details

Lookup Name
Certifier John Smith

Company name
Certifier Company Name

Certifier name
John Smith

Street Address
789 Main Street

City
Hamilton

Country
Canada

Province/State
Ontario

Postal/Zip Code
L6T 2M2

Telephone Number
(905)458-6568

Telephone Extension

Fax Number

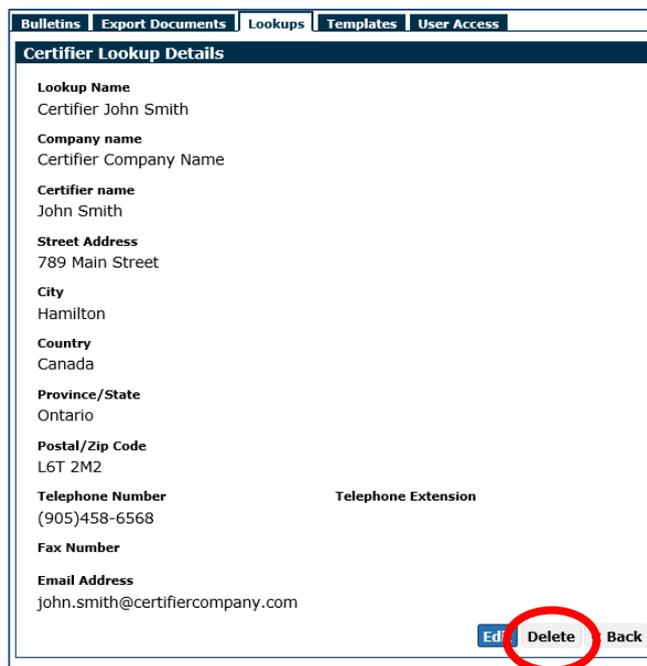
Email Address
john.smith@certifiercompany.com

Edit Delete < Back

Deleting a Lookup Record

While viewing a Lookup record, the user can perform the following maintenance actions:

- Click the Delete button to permanently remove the Lookup record from the CERS Business Account



Bulletins | **Export Documents** | **Lookups** | **Templates** | **User Access**

Certifier Lookup Details

Lookup Name
Certifier John Smith

Company name
Certifier Company Name

Certifier name
John Smith

Street Address
789 Main Street

City
Hamilton

Country
Canada

Province/State
Ontario

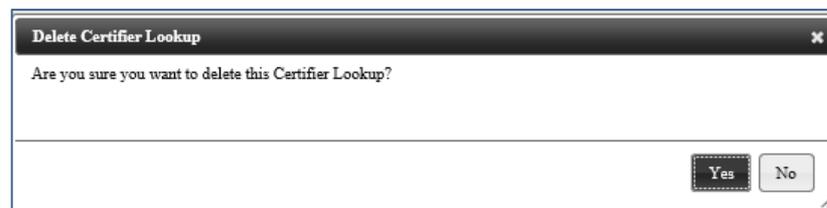
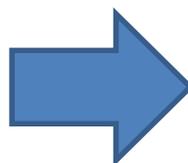
Postal/Zip Code
L6T 2M2

Telephone Number **Telephone Extension**
(905)458-6568

Fax Number

Email Address
john.smith@certifiercompany.com

[Edit](#) | [Delete](#) | [Back](#)



Delete Certifier Lookup [X]

Are you sure you want to delete this Certifier Lookup?



Editing a Lookup Record

- Click the Edit button to access the Lookup record in “edit mode”

Bulletins | Export Documents | **Lookups** | Templates | User Access

Certifier Lookup Details

Lookup Name
Certifier John Smith

Company name
Certifier Company Name

Certifier name
John Smith

Street Address
789 Main Street

City
Hamilton

Country
Canada

Province/State
Ontario

Postal/Zip Code
L6T 2M2

Telephone Number **Telephone Extension**
(905)458-6568

Fax Number

Email Address
john.smith@certifiercompany.com

Edit Delete < Back



Bulletins | Export Documents | **Lookups** | Templates | User Access

Edit Certifier Lookup

All fields are mandatory unless otherwise specified.

Lookup Name
Certifier John Smith

Company name
Certifier Company Name

Certifier name
John Smith

Street Address
789 Main Street

City
Hamilton

Country
Canada

Province/State
Ontario

Postal/Zip Code
L6T 2M2

Telephone Number **Telephone Extension**
(905)458-6568

Fax Number

Email Address
john.smith@certifiercompany.com

Submit Save As... Cancel



Editing a Lookup Record

While editing a Lookup record, a user can:

- Click the **Submit** button to save the modifications made to the Lookup record's business data entries;
- Click the **Save As** button to assign the updated business data entries to a separate, new Lookup record; or
- Click the **Cancel** button to undo any modifications that have been applied to the Lookup record's business data entries and return to the Lookup section.

Bulletins | **Export Documents** | **Lookups** | **Templates** | **User Access**

Edit Consignee Lookup

All fields are mandatory unless otherwise specified.

Lookup Name ?

Company name ?

Street Address ?

City ?

Country ?

Province/State ?

Submit **Save As...** **Cancel**



Editing a Lookup Record

Lookup records are organized based on their subject matter. CERS Portal does not permit more than one Lookup record of a particular type to be assigned the same Lookup Name.

Example: CERS will not permit more than one Certifier Lookup record to be assigned Lookup Name "Certifier John Smith".

Bulletins | Export Documents | **Lookups** | Templates | User Access

Lookups

Exporter | Consignee | Service Provider | **Certifier** | HS Code | Summary Report Line

[Create Certifier Lookup](#)

Show 10 entries

Lookup Name	Address	City
Certifier John Smith	789 Main Street	Hamilton
GENERIC CERTIFIER	CERTIFIER STREET X...	CERTIFIER CITY XXX...

Showing 1 to 2 of 2 entries

Bulletins | Export Documents | **Lookups** | Templates | User Access

Create Certifier Lookup

All fields are mandatory unless otherwise specified.

Lookup Name

Company name

Certifier Name

Street Address

City

Country

Province/State

Postal/Zip Code

Telephone Number Telephone Extension

Fax Number

Email Address

[Create](#) [Cancel](#)

Lookup Name

Lookup Name already exists.

[Ok](#)



8. Managing and Using Templates

- Templates Section
- Viewing, Editing, and Deleting a Template record
- Making use of a Template record



Templates Section

Within a CERS Business Account, the **Templates** tab acts as the storage location for all Template records.

- After submitting an Export Declaration or a Summary Report to the CBSA, the user can save the document's business data entries to a new Template record.

CERS Portal Canada

Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001) John Smith (URN: M0547939) CERS Portal Help and Support | Log out

Bulletins Export Documents Lookups **Templates** User Access

Templates

Note: You may save an additional 12 Template(s) for this Business Account.

Show 10 entries Filter

Template Name	Document Type
Declaration for Consignee X	Export Declaration
Manny's Export Declaration	Export Declaration
Manny's Summary Report Template	Summary Report

Showing 1 to 3 of 3 entries



Viewing a Template

To view an existing Export Document template:

- 1) Access the Templates tab.
- 2) Click one of the links provided in the Template Name section.

Bulletins | Export Documents | Lookups | **Templates** | User Access

Templates

Note: You may save an additional 12 Template(s) for this Business Account.

Show 10 entries Filter

Template Name	Document Type
Declaration for Consignee X	Export Declaration
Manny's Export Declaration	Export Declaration
Manny's Summary Report Template	Summary Report

Showing 1 to 3 of 3 entries

Bulletins | Export Documents | Lookups | **Templates** | User Access

Export Declaration Template

Exporter Name: **ABC Company Inc.**
Exporter Business Number: **129260675RM0009**
Export Declaration Template Name: **Manny's Export Declaration**

Export | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Business Number 129260675RM0009 **Authorized ID** WQ6776

Are parties related? No

Exporter Name EXPORTER NAME

Street Address EXPORTER STREET

City OTTAWA

Country Canada

Province/State Ontario

Postal/Zip Code K2P2E6

Telephone Number (613)608-8972 **Telephone Extension**

Fax Number

Exporter Reference Number(s)
EXP REF NUMBER

Export | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Edit Delete < Back



Deleting a Template

While viewing a Template record, the user can perform the following maintenance actions:

- Click the Delete button to permanently remove the Template record from the CERS Business Account

Export Declaration Template

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001
Export Declaration Template Name: Manny's Export Declaration

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Business Number 129260675RM0009 **Authorized ID** WQ6776

Are parties related?
No

Exporter Name
EXPORTER NAME

Street Address
EXPORTER STREET

City
OTTAWA

Country
Canada

Province/State
Ontario

Postal/Zip Code
K2P2E6

Telephone Number (613)608-8972 **Telephone Extension**

Fax Number

Exporter Reference Number(s)
EXP REF NUMBER

Exporter | Consignee | Service Provider | Certifier | Commodity | **Other Export Details** | Customs Details

Edit **Delete** < Back

Delete Export Document Template [X]

Are you sure you want to delete this Export Declaration Template?

Yes No



Editing a Template Record

- Click the Edit button to access the Template record in “edit mode”

Bulletins | Export Documents | Lookups | Templates | User Access

Export Declaration Template

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001
Export Declaration Template Name: Manny's Export Declaration

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Business Number 129260675RM0009	Authorized ID WQ6776
---	--------------------------------

Are parties related?
No

Exporter Name
EXPORTER NAME

Street Address
EXPORTER STREET

City
OTTAWA

Country
Canada

Province/State
Ontario

Postal/Zip Code
K2P2E6

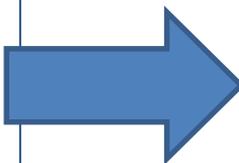
Telephone Number **Telephone Extension**
(613)608-8972

Fax Number

Exporter Reference Number(s)
EXP REF NUMBER

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Edit Delete < Back



Bulletins | Export Documents | Lookups | Templates | User Access

Edit Export Declaration Template

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001
Export Declaration Template Name: Manny's Export Declaration

All fields are mandatory unless otherwise specified.

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Business Number 129260675RM0009	Authorized ID WQ6776
---	--------------------------------

Lookup Name
 [Select a Lookup](#)
Mandatory if creating a lookup

Are parties related?
 Yes
 No

Exporter Name

Street Address

City

Country
Canada

Province/State
Ontario



Editing a Template Record

When editing a Template record, a user can:

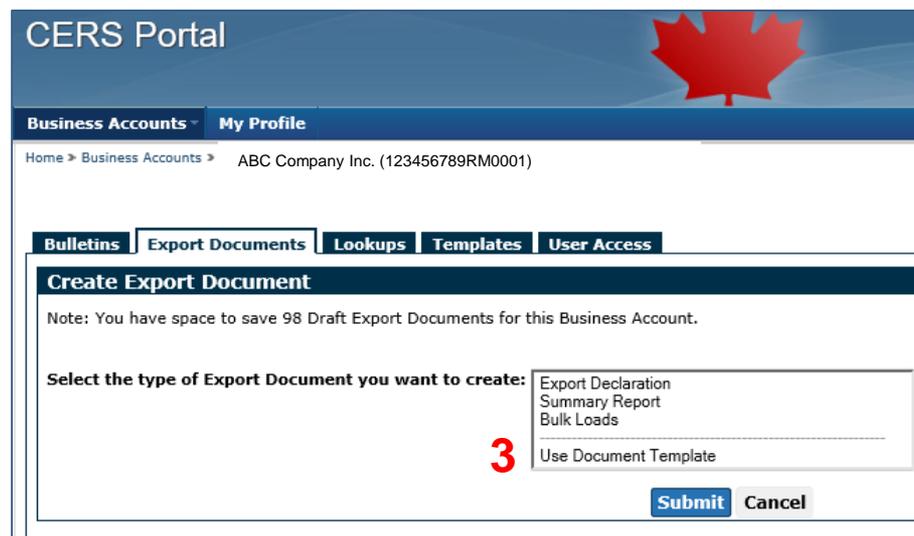
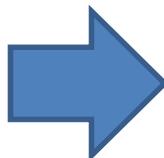
- Click the **Save** button to save the modifications that have been applied to the Template record's business data entries;
- Click the **Save As** button to assign the updated business data entries to a separate, new Template record; or
- Click the **Cancel** button to undo any modifications that have been applied to the Template record's business data entries and return to the Template section.

The screenshot shows a web form for editing an export document template. At the top, there are six tabs: 'Exporter', 'Consignee', 'Service Provider', 'Certifier', 'Commodity', 'Other Export Details', and 'Customs Details'. Below the tabs, a message reads 'Complete all mandatory fields within the tabs above.' In the center, there are three buttons: 'Save', 'Cancel', and 'Save As...'. The 'Save As...' button is a dropdown menu. At the bottom, there is a text input field labeled 'Export Document Template Name:' followed by a 'Create Template' button with a question mark icon.

Making Use of a Template

To use a Template record to create a new (draft) Export Document:

- 1) Access the Export Documents tab.
- 2) Click the Create Export Document button.
- 3) Within the Create Export Document page, select option **Use Document Template** then click the Submit button.





Making Use of a Template

- 4) Within the “**Select ... Template**” page, choose one of the existing Export Declaration or Summary Report Template records then click the Select button.

CERS Portal

Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001) [CERS Portal Help](#)

Bulletins Export Documents Lookups **Templates** User Access

Select an Export Declaration Template

Note: You may save an additional 993 Template(s) for this Business Account.

Show entries Filter

Select	Template Name	Document Type
<input type="radio"/>	FRancis	Export Declaration
<input type="radio"/>	GENERIC ED TEMPLATE	Export Declaration
<input type="radio"/>	GENERIC SR TEMPLATE	Summary Report
<input type="radio"/>	John's Summary Report Template2	Summary Report
<input type="radio"/>	Manny SRP	Summary Report
<input checked="" type="radio"/>	Manny's Export Declaration	Export Declaration
<input type="radio"/>	Manny's Summary Report Template	Summary Report

Showing 1 to 7 of 7 entries

4



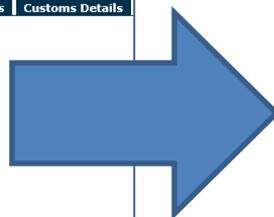
Making Use of a Template

Result: CERS will automatically create a new (draft) Export Document containing the same business data entries that were assigned to the Template record.

Export Declaration Template

ABC Company Inc.
Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001
Export Declaration Template Name: Manny's Export Declaration

Exporter	Consignee	Service Provider	Certifier	Commodity	Other Export Details	Customs Details
Business Number		Authorized ID				
129260675RM0009		WQ6776				
Are parties related?						
No						
Exporter Name						
EXPORTER NAME						
Street Address						
EXPORTER STREET						
City						
OTTAWA						
Country						
Canada						
Province/State						
Ontario						
Postal/Zip Code						
K2P2E6						
Telephone Number		Telephone Extension				
(613)608-8972						



Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001)

Bulletins Export Documents Lookups Templates User Access

Create Export Declaration

ABC Company Inc.
Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001

All fields are mandatory unless otherwise specified.

Exporter Consignee Service Provider Certifier Commodity Other Export Details Customs Details

Business Number 129260675RM0009 Authorized ID WQ6776

Look up Name [Select a Lookup](#)

Mandatory if creating a lookup

Are parties related? Yes No

Exporter Name

Street Address

City

Country

Province/State

Postal/Zip Code

Telephone Number (optional)



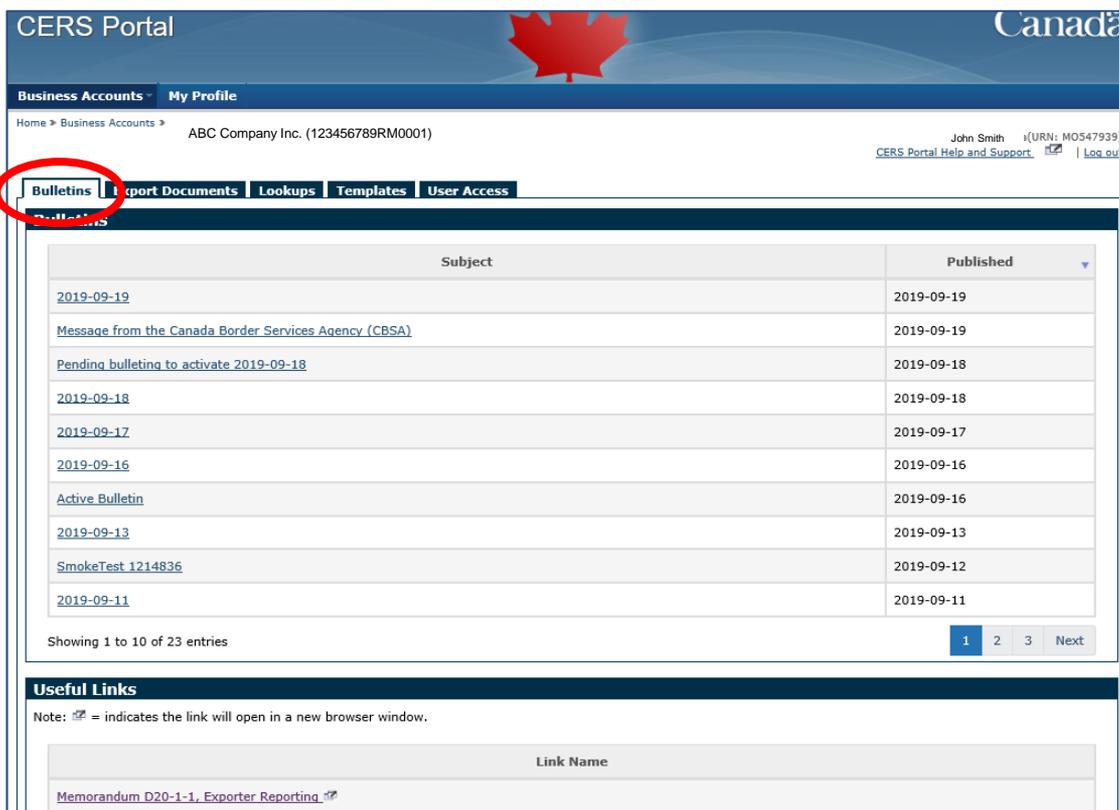
9. Viewing Bulletins and Links

- Bulletins Section
 - Viewing Bulletins
- Viewing Useful Links

Bulletins Section

Within a CERS Business Account, the Bulletins tab enables the CBSA to share informational resources with CERS users:

- 1) CBSA will publish **Bulletins** to advise CERS users of matters related to exporter reporting.
- 2) CBSA will publish **Useful Links** to direct CERS users to web pages related to exporter reporting.



The screenshot shows the CERS Portal interface. The 'Bulletins' tab is highlighted with a red circle. Below the navigation tabs, there is a table of bulletins with columns for 'Subject' and 'Published'. The table contains 10 entries, with the first entry being '2019-09-19' and the last being '2019-09-11'. Below the table, there is a 'Useful Links' section with a note: 'Note:  = indicates the link will open in a new browser window.' and a table with one entry: 'Memorandum D20-1-1, Exporter Reporting .

Subject	Published
2019-09-19	2019-09-19
Message from the Canada Border Services Agency (CBSA)	2019-09-19
Pending bulleting to activate 2019-09-18	2019-09-18
2019-09-18	2019-09-18
2019-09-17	2019-09-17
2019-09-16	2019-09-16
Active Bulletin	2019-09-16
2019-09-13	2019-09-13
SmokeTest 1214836	2019-09-12
2019-09-11	2019-09-11

Showing 1 to 10 of 23 entries

Link Name
Memorandum D20-1-1, Exporter Reporting 

Viewing Bulletins

To view an informational bulletin from the CBSA:

- 1) Access the Bulletins tab.
- 2) Within the Bulletins table, click the link provided for a Subject heading of interest.



The screenshot displays the CBSA web application interface. On the left, a navigation menu includes 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The 'Bulletins' tab is selected, showing a table with columns for date and subject. A red '1' is placed above the 'Bulletins' tab, and a red '2' is placed above the link 'Message from the Canada Border Services Agency (CBSA)' in the subject column. A large blue arrow points from this link to a detailed view of the bulletin on the right.

The detailed view shows the following information:

- Business Accounts** | **My Profile**
- Home > Business Accounts > ABC Company Inc. (123456789RM0001)
- Bulletins** | **Export Documents** | **Lookups** | **Templates** | **User Access**
- Bulletin 2 of 23**
- Subject: **Message from the Canada Border Services Agency (CBSA)**
- Published: **2019-09-19**
- As of June 30, 2020, the CBSA will no longer accept B13As. Exporters, or their customs service providers, will be required to report their exports electronically. Electronic export reporting will be mandated via a prescription document, in accordance with paragraphs a) and b) of the definition of prescribed in section 2 of the Customs Act and subsection 95(4) of this Act.
- There will be two electronic reporting methods available to exporters to report goods: the Canadian Export Reporting System (CERS) and the G7 Export Reporting Electronic Data Interchange (G7-EDI). Exporters can register for CERS once it is in place, March 16, 2020. G7-EDI is currently in existence and can be used now. G7-EDI requires an investment from the exporting client.
- Navigation: << Previous | Next >>
- Print/Download Bulletin (PDF) | < Back to Bulletins List

At the bottom of the detailed view, there is a table with two rows:

2019-09-12
2019-09-11

Below the table, it says 'Showing 1 to 10 of 23 entries' and a pagination control with '1', '2', '3', and 'Next' buttons.



Viewing Bulletins

NOTE: CBSA will publish Bulletins to advise CERS users of matters related to exporter reporting (e.g. system maintenance events). Clients should periodically check the Bulletins section to see if any new notifications have been published by the CBSA.



Viewing Bulletins

- When viewing a bulletin, the user can click a “Print/Download Bulletin” link to access the bulletin in PDF file format.

Business Accounts My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001) CERS D

Bulletins Export Documents Lookups Templates User Access

Bulletin 2 of 23

Subject: **Message from the Canada Border Services Agency (CBSA)**
Published: **2019-09-19**

As of June 30, 2020, the CBSA will no longer accept B13As. Exporters, or their customs service providers, will be required to report their exports electronically. Electronic export reporting will be mandated via a prescription document, in accordance with paragraphs a) and b) of the definition of prescribed in section 2 of the Customs Act and subsection 95(4) of this Act.

There will be two electronic reporting methods available to exporters to report goods: the Canadian Export Reporting System (CERS) and the G7 Export Reporting Electronic Data Interchange (G7-EDI). Exporters can register for CERS once it is in place, March 16, 2020. G7-EDI is currently in existence and can be used now. G7-EDI requires an investment from the exporting client.

Previous Next >>

Print/Download Bulletin (PDF) < Back to Bulletins List

Do you want to open or save **bulletin.pdf** (929 KB) from **apps-ho1.cbsa-asfc.gc.ca**?

Open Save Cancel

Canada Border Services Agency Agence des services frontaliers du Canada

CERS Portal – System Message
*** La version française suit ***

Subject: **Message from the Canada Border Services Agency (CBSA)**
Published: 2019-09-19

As of June 30, 2020, the CBSA will no longer accept B13As. Exporters, or their customs service providers, will be required to report their exports electronically. Electronic export reporting will be mandated via a prescription document, in accordance with paragraphs a) and b) of the definition of prescribed in section 2 of the Customs Act and subsection 95(4) of this Act.



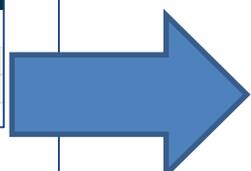
Viewing Useful Links

The Useful Links table contains hyperlinks to web resources recommended by the CBSA. Click a Link Name entry to access its associated web page.

Bulletins	
	Subject
2019-09-19	Message from the Canada Border Services Agency (CBSA)
	Pending bulletin to activate 2019-09-18
2019-09-18	
2019-09-17	
2019-09-16	
	Active Bulletin
2019-09-13	
	SmokeTest 1214836
2019-09-11	

Showing 1 to 10 of 23 entries

Useful Links	
	Link Name
Memorandum D20-1-1, Exporter Reporting	



https://www.cbsa-asfc.gc.ca/publications/dm-md/d20-1-1-eng.html

Government of Canada / Gouvernement du Canada

Canada.ca | Services | Departments | Français

Canada Border Services Agency

Canada

Travellers | Import and Export | Securing the Border | Publications

Home → Publications → D Memoranda → D20

Exporter Reporting

Memorandum D20-1-1

ISSN 2369-2391
Ottawa, May 10, 2018

This document is also available in [PDF \(431 Kb\)](#) [\[help with PDF files\]](#)

In Brief

The revisions to the memorandum include: a reduction in the length of time a Summary Reporting Program (SRP) application is valid (from 5 years to 2 years); updates to the SRP contact information; and changes in style and formatting.

This memorandum outlines and explains the obligations, guidelines, and procedures for reporting goods that are exported from Canada.

Guidelines and General Information

Definitions

1. The following definitions, some already found in the [Customs Act](#) or the [Reporting of Exported Goods Regulations](#), apply in this memorandum:

Act
Means the Customs Act.



10. Summary Reports

- Overview of the CBSA Summary Reporting Program (SRP)
- Creating a Summary Report
- Submitting a Summary Report to the CBSA
- View, Amending, and Voiding a Submitted Summary Report
- “Upload Summary Report” feature



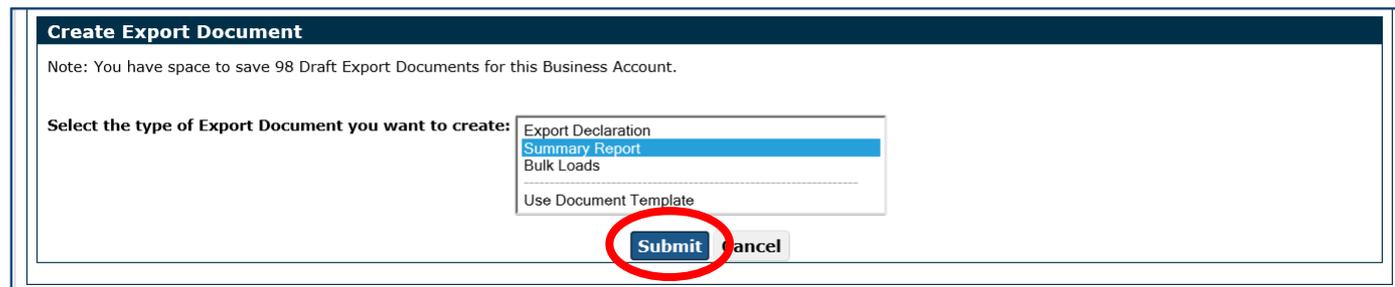
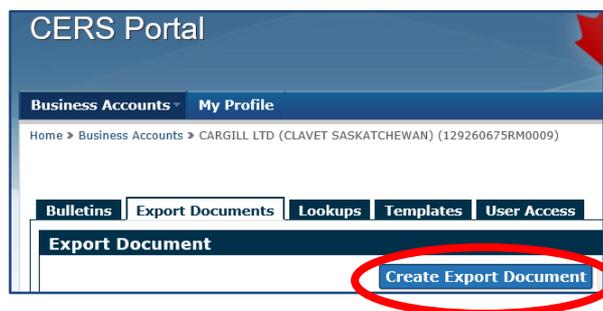
Overview of the Summary Reporting Program (SRP)

Upon application, exporters who ship **bulk or homogeneous goods** from Canada may be granted permission to participate in the CBSA Export **Summary Reporting Program (SRP)**.

- For the SRP, an exporter must complete a new SRP report submission each month to supply summary information regarding export transactions that had occurred during the previous month. (An exporter must complete a NIL report submission if no eligible export transactions occurred during the previous month)
- The electronic SRP report submission must be completed within five business days following the end of the month in which the goods were exported.

Creating a Summary Report

- 1) Within the Export Documents tab, click the **Create Export Document** button.
- 2) Within the “Create Export Document” page, select option **Summary Report** then click Submit.



The screenshot displays the 'Create Export Document' page. A note at the top states: 'Note: You have space to save 98 Draft Export Documents for this Business Account.' Below the note, the instruction 'Select the type of Export Document you want to create:' is followed by a dropdown menu. The menu is open, showing 'Export Declaration', 'Summary Report' (which is highlighted), and 'Bulk Loads'. Below the dropdown is a checkbox labeled 'Use Document Template'. At the bottom of the form, the 'Submit' button is circled in red, along with a 'Cancel' button.



Creating a Summary Report: Additional Info

- The Create Export Document - “Summary Report” option will only be available if the associated Business Account has been configured by CBSA to support Summary Reporting.
- Exporter companies need to complete a registration process and receive approval from CBSA to participate in the Export Summary Reporting Program (SRP). For existing SRP clients, CBSA will ensure that the existing SRP account information will be transferred over to the exporter’s CERS Business Account.



Create Summary Report: General Tab

Within the Create Summary Report page, the SRP report is organized into two sections:

1) General tab (Report Header info)

- Reporting Period
- Export Company Name
- Certifier Name and Address; Contact info

The screenshot shows the 'General' tab of the 'Create Summary Report' form. The 'General' tab is highlighted with a red circle. The form contains the following fields and sections:

- Reporting Period:** A dropdown menu with the value '201909' selected.
- Create a NIL Report:** A checkbox that is currently unchecked.
- Export Company Name:** A text input field.
- Certifier Information:** A section containing several fields:
 - Certifier Name:** A text input field.
 - Street Address:** A text input field.
 - City:** A text input field.
 - Country:** A dropdown menu with the value '-- Select Country --' selected.
 - Province/State:** A dropdown menu with the value '-- Select Province/State --' selected.
- Postal/Zip Code:** A text input field.
- Telephone Number:** A text input field.
- Telephone Extension:** A text input field.



Create Summary Report: Commodities Tab

2) Commodities tab (Entry lines)

- Place of Exit
- Country of Final Destination
- Export HS Code
- Description of Goods
- Quantity and applicable Unit of Measure

Export Documents | **Lookups** | **Templates** | **User Access**

Create Summary Report

Exporter Business Number: 123456789RM0001
Exporter Name: ABC Company Inc.
Summary ID: SUM6519

All fields are mandatory unless otherwise specified.

general | **Commodity**

Note: You may save an additional 9999 Commodity items for this Summary Report

Add Commodity | Select Summary Report Line Item Lookup

Show 10 entries Filter

Number	HSB Code	Quantity	UOM	Value	Edit	Delete
Export Document Template List is Empty						

Showing 0 to 0 of 0 entries

Upload Summary Report
Browse... Submit

general | **Commodity**

Complete all mandatory fields within the tabs above.

Check for Errors Save and Continue Save and Finish Later Submit to the CBSA

Bulletins | **Export Documents** | **Lookups** | **Templates** | **User Access**

Create Summary Report

Commodity #001

All fields are mandatory unless otherwise specified.

Lookup Name **Select a Lookup**

Mandatory if creating a lookup

Goods

HS Commodity code

Your Description

Quantity **Unit of measure**

Value FOB point of exit **Currency of Declared Value**

Gross Weight **Unit of measure**

Freight Charge

Summary Report Line Lookup

- When entering information into the Create Summary Report page, the user has the option to save a Commodity Line entry as a **“Summary Report Line Lookup”** record.

Create Summary Report

Commodity #001

All fields are mandatory unless otherwise specified.

Lookup Name ⓘ
John's Summary Report - HS Lookup
Mandatory if creating a lookup

Goods

HS Commodity code ⓘ
4403.21.20

Your Description ⓘ
Telephone Poles (Pine Wood)

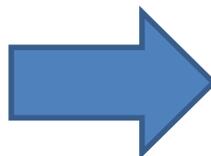
Quantity ⓘ **Unit of measure** ⓘ
250 Metre

Other

Are parties related? ⓘ Yes No

Mode of Transport ⓘ
Marine

Use the above information to



Summary Report Line Lookup Created ⓘ

Your new Summary Report Line Lookups Lookup has been created.



Summary Report Line Lookup

Within the **Lookups** section, a user can access the Summary Report Line sub-section to view the associated Lookup records.

The screenshot displays the CERS Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, the breadcrumb trail reads 'Home > Business Accounts > ABC Company Inc. (123456789RM0001)'. The user is identified as 'John Smith (URN: MO547939)' with links for 'CERS Portal Help and Support' and 'Log out'. The main navigation menu includes 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The 'Lookups' section is active, with sub-tabs for 'Exporter', 'Consignee', 'Service Provider', 'Certifier', 'HS Code', and 'Summary Report Line'. The 'Summary Report Line' tab is selected and circled in red. A blue button labeled 'Create Summary Report Line Lookup' is visible. Below the button, there is a 'Show 10 entries' dropdown and a 'Filter' input field. A table with the following data is displayed:

Lookup Name	HS8 Code	Place of Exit	Country of final destination
John's Summary Rep...	4403.21.20	Montréal	Japan

Showing 1 to 1 of 1 entries



Summary Report Line Lookup

Within the Create Summary Report page, Commodity tab, a user can click the **“Select Summary Report Line Item Lookup”** button to initiate a process for transferring an existing Commodity Line Lookup record’s business data entries to the new, draft Summary Report.

The screenshot shows the 'Create Summary Report' page with the 'Commodity' tab selected. The 'Select Summary Report Line Item Lookup' button is highlighted with a red circle. Below it, a table displays the selected lookup record.

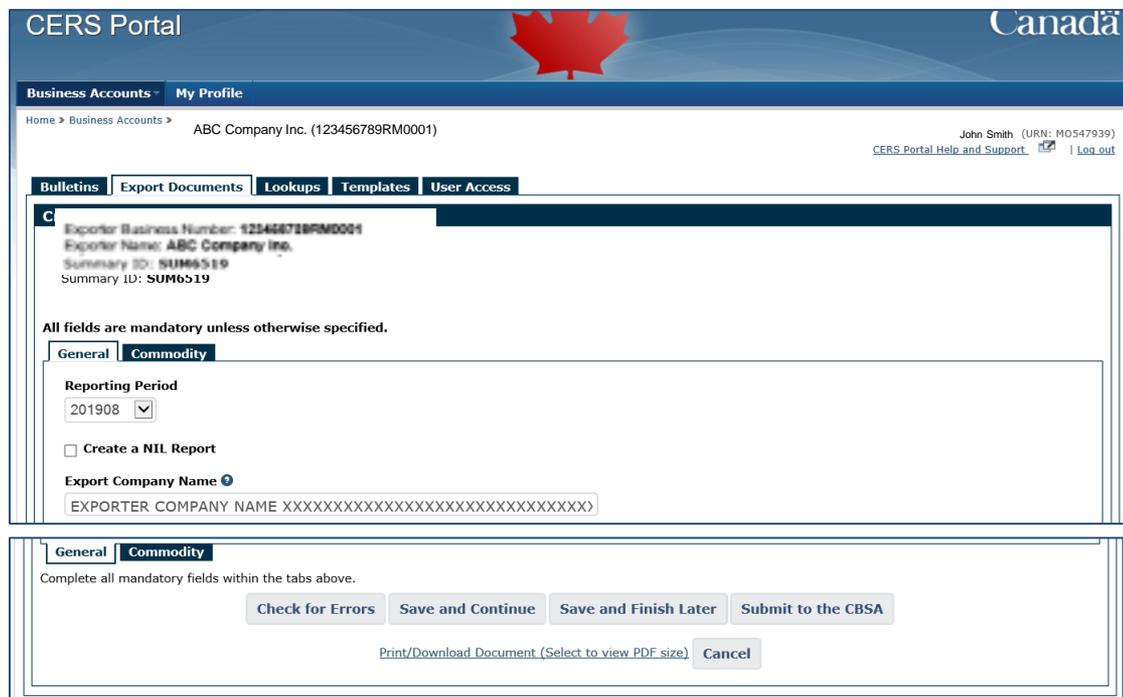
Number	HSB Code	Quantity	UOM	Value	Edit	Delete
Export Document Template List is Empty						

Lookup Name	HSB Code	Place of Exit	Country of final destination
<input checked="" type="checkbox"/> John's Summary Rep...	4403.21.20	Montréal	Japan

Create Summary Report: Program Options

Within the Create Summary Report page, the user can perform the following options:

- Save a draft version of the Summary Report
- Check for business data entry errors
- Submit the Summary Report to the CBSA



CERS Portal

Canada

Business Accounts - My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001)

John Smith (URN: M0547939)
CERS Portal Help and Support | Log out

Bulletins | Export Documents | Lookups | Templates | User Access

Exporter Business Number: 123456789RM0001
Exporter Name: ABC Company Inc.
Summary ID: SUM6519
Summary ID: SUM6519

All fields are mandatory unless otherwise specified.

General | Commodity

Reporting Period
201908

Create a NIL Report

Export Company Name
EXPORTER COMPANY NAME XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

General | Commodity

Complete all mandatory fields within the tabs above.

Check for Errors | Save and Continue | Save and Finish Later | Submit to the CBSA

Print/Download Document (Select to view PDF size) | Cancel



Save or Print a Summary Report

After submitting a draft Summary Report to the CBSA, the user can:

- Save the SRP report as a new Export Document Template
- Print/download a PDF file version of the submitted Summary Report

The screenshot displays the CERS Portal interface. The main window is titled "Create Summary Report" and shows the following information:

- Exporter Business Number: 123456789RMD001
- Exporter Name: ABC Company Inc.
- Summary ID: SUM6519

Below this information, there are tabs for "General" and "Commodity". A note states: "All fields are mandatory unless otherwise specified." Under the "Commodity" tab, there is a table with one entry:

Number	440
#001	440

A modal dialog box titled "Submit to the CBSA" is open, asking for confirmation to submit the report. The dialog contains the following text:

Please verify the information below is correct:
Reporting Period: 201908
Are you sure you want to submit your Summary Report?

Buttons for "Yes" and "No" are visible at the bottom of the dialog.

At the bottom of the main form, there are buttons for "Check for Errors", "Save and Continue", "Save and Finish Later", and "Submit to the CBSA". Below these buttons, there is a link for "Print/Download Document (Select to view PDF size)" and a "Cancel" button.

Overlaid on the right side of the screenshot is a smaller window titled "CERS Portal" showing the user's profile information:

- Business Accounts > My Profile
- Home > Business Accounts > ABC Company Inc. (123456789RMD001)

Below the profile information, there are tabs for "Bulletins", "Export Documents", "Lookups", "Templates", and "User Access". The "Export Documents" tab is active, showing a message: "Submitted to the CBSA". The message states: "Your Summary Report has been submitted to the CBSA. Proof of Report: SUM6519WQ6776201908 Reporting Period: 201908". There is a link for "Print/Download Document (Select to view PDF size)" and a note: "Use submitted Summary Report information to create Export Document template". An "OK" button is at the bottom right of this window.



Print/Download CERS Summary Report

CERS Portal

Business Accounts - My Profile

Home > Business Accounts > ABC Company Inc. (123456789RM0001)

Bulletins | **Export Documents** | Lookups | Templates | User Access

Submitted to the CBSA

Your Summary Report has been submitted to the CBSA.

Proof of Report: **SUM6519WQ6776201908**

Reporting Period: **201908**

[Print/Download Document \(Select to view PDF size\)](#)

Use submitted Summary report information to create Export Document template

OK

SummaryReport.pdf - Adobe Acrobat Reader 2017

File Edit View Window Help

Home Tools SummaryReport.pdf x

1 / 1 100%

Canada Border Services Agency / Agence des services frontaliers du Canada

CERS SUMMARY REPORT / DÉCLARATION SOMMAIRE SCDE

Proof of report no - No de la preuve de déclaration
John's Summary Report Template

Exporter Business Number - Numéro d'entreprise de l'exportateur
123456789RM0001

Reporting Period - Période de déclaration
201908

Original Amended - Modifié Void - Nul
 NIL Report - Rapport néant

Certifier information - Renseignements du certificateur

Certifier Name - Nom du certificateur CERTIFIER NAME	Company Name - Nom de l'entreprise EXPORT COMPANY NAME
Street address - Address de rue CERTIFIER STREET	City - Ville CERTIFIER CITY
Province/state, country - Province/État, pays Ontario Canada	Postal/Zip code - Code postal/ZIP K2P0X5
Telephone Number - Numéro de téléphone Extension (613)608-8972	Fax Number - Numéro de fax (613)608-8973
E-mail Address - Courriel CERTIFIER@EMAILADDRESS.COM	

Commodity Information - Information de Marchandise

HS8 Code Code SH8 Description	Quantity Quantité	Freight Charge Frais de transport	Port of Exit - Port de sortie Country of Final Destination Pays de destination finale	Value FOB Valeur f.a.b	Origin - Origine Country/Pays Province/State-État	Gross Weight Poids brut	Mode of/de Transport Vessel Name Nom du navire	Containerized En Conteneur	Permit Numbers Numéro de permis
44032120 Pine wood poles	600 Metre	300 CAD	0396 Japan	12000 CAD	Canada Quebec	700 Kilogram	Marine OOCL MONTREAL	0	Permit1, Permit2

Total number of commodities - Nombre de marchandises totale



Export Documents - Submitted Documents Tab

Within the Export Documents - **Submitted Documents** tab, a user can change the Export Document Type setting to have CERS display information related to Summary Reports that were submitted to the CBSA.

Draft Documents Submitted Documents Bulk Upload
Select Export Document Type Export Declaration Summary Report Refresh

Bulletins Export Documents Lo Templates User Access

Export Document

Create Export Document Search Submitted Export Documents

Draft Documents Submitted Documents Bulk Upload

Select Export Document Type Summary Report Refresh

Show 10 entries Filter

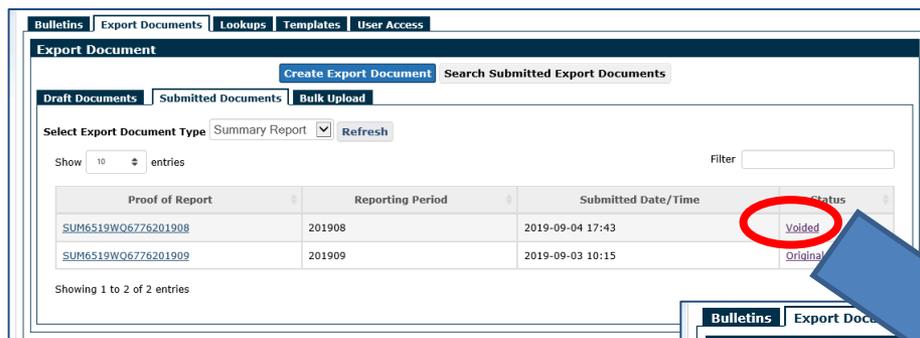
Proof of Report	Reporting Period	Submitted Date/Time	Status
SUM6519WQ6776201909	201909	2019-09-03 10:15	Original

Showing 1 to 1 of 1 entries

1

Summary Report: Status History

Within the Submitted Documents tab, a user can click a **Status** link to view information regarding the entire history of reporting events for the chosen Summary Report:



Export Document

Create Export Document Search Submitted Export Documents

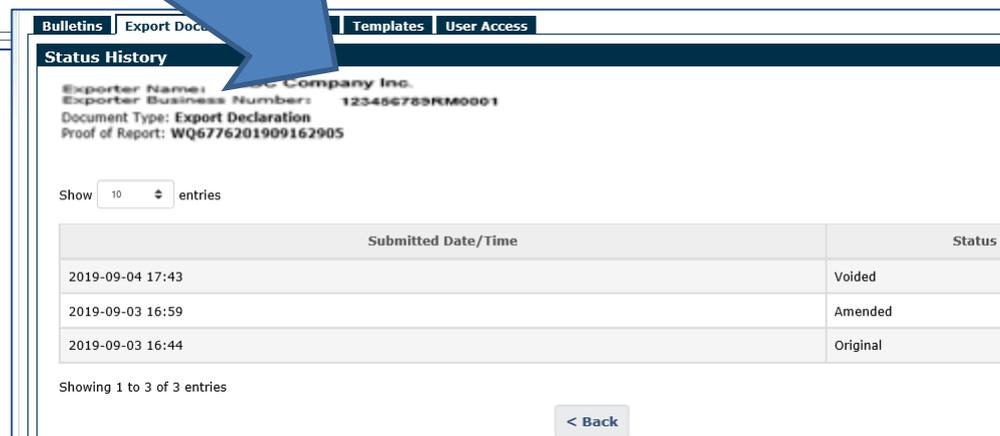
Draft Documents Submitted Documents Bulk Upload

Select Export Document Type Summary Report Refresh

Show 10 entries Filter

Proof of Report	Reporting Period	Submitted Date/Time	Status
SUM6519WQ6776201908	201908	2019-09-04 17:43	Voided
SUM6519WQ6776201909	201909	2019-09-03 10:15	Original

Showing 1 to 2 of 2 entries



Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RMM0001
Document Type: Export Declaration
Proof of Report: WQ6776201909162905

Show 10 entries

Submitted Date/Time	Status
2019-09-04 17:43	Voided
2019-09-03 16:59	Amended
2019-09-03 16:44	Original

Showing 1 to 3 of 3 entries

< Back

- Date/time of Original report submission
- Date/time amended
- Date/time voided



View Submitted Summary Report

Within the Submitted Documents tab, a user can click a Proof of Report link in order to view a submitted Summary Report.

Export Document

[Create Export Document](#) [Search Submitted Export Documents](#)

Draft Documents | **Submitted Documents** | **Bulk Upload**

Select Export Document Type: Summary Report

Show 10 entries Filter

Proof of Report	Reporting Period	Submitted Date/Time
SUM6519WQ6776201908	201908	2019-09-03 16:44
SUM6519WQ6776201909	201909	2019-09-03 10:15

Showing 1 to 2 of 2 entries

View Submitted Summary Report

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001
Summary ID: SUM6519
Proof of Report: SUM6519WQ6776201908
Submitted Date/Time: 2019-09-03 16:44
Status: Original

NIL Report: No
Reporting Period: 201908

General | **Commodity**

Company Name: EXPORT COMPANY NAME
Certifier Name: CERTIFIER NAME
Street Address: CERTIFIER STREET
City: CERTIFIER CITY
Country: Canada
Province/State: Ontario
Postal/Zip Code: K2POX5
Telephone Number: (613)608-8972
Telephone Extension:
Fax Number: (613)608-8973
Email Address: CERTIFIER@EMAILADDRESS.COM

[Print/Download Document \(Select to view PDF size\)](#)

► Use submitted Summary Report information to create Export Document template



Amending a Summary Report

Within the **View Submitted Summary Report** page, a user can click the **Amend** button in order to edit the report and submit an updated version to the CBSA.

View Submitted Summary Report

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001
Summary ID: SUM6519
Proof of Report: SUM6519WQ6776201908
Submitted Date/Time: 2019-09-03 16:44
Status: Original

NIL Report: No
Reporting Period: 201908

General Commodity

Company Name
EXPORT COMPANY NAME

Amend



Amend Summary Report

Exporter Name: ABC Company Inc.
Exporter Business Number: 123456789RM0001
Summary ID: SUM6519

Proof of Report: SUM6519WQ6776201908
Submitted Date/Time: 2019-09-03 16:52
Status: Original

All fields are mandatory unless otherwise specified.

General Commodity

Reporting Period
201908

Check for Errors Resubmit to CBSA

Print/Download Document (Select to view PDF size) Cancel

Resubmit to CBSA

Please verify the information below is correct:
Reporting Period: 201908
Are you sure you want to resubmit your Summary Report?

Yes No

Select Reason For Amendment

Select	Amend
<input type="radio"/>	Addition of or change in export permit/licence/certificate number
<input type="radio"/>	Change in carrier and/or cargo control number
<input type="radio"/>	Change in country of final destination and/or ultimate consignee information
<input type="radio"/>	Change in date of export
<input type="radio"/>	Change in description of goods (including quantity, country of origin, value, HS code)
<input type="radio"/>	Change in line items within the declaration (addition or removal of line items)
<input type="radio"/>	Change in place of export
<input type="radio"/>	Goods no longer being exported from Canada
<input type="radio"/>	Reason not listed above

Select Cancel



Voiding a Summary Report

Within the **View Submitted Summary Report** page, a user can click the **Void** button to have the CBSA cancel/void the submitted Summary Report.

View Submitted Summary Report

ABC Company Inc.
Exporter Name:
Exporter Business Number: 123456789RM0001
Summary ID: SUM6519
Proof of Report: SUM6519WQ6776201908
Submitted Date/Time: 2019-09-03 16:44
Status: Original

NIL Report: No
Reporting Period: 201908

General | **Commodity**

Company Name
EXPORT COMPANY NAME

Certifier Name
CERTIFIER NAME

Street Address
CERTIFIER STREET

City
CERTIFIER CITY

Country
Canada

Province/State
Ontario

Postal/Zip Code
K2P0X5

Telephone Number **Telephone Extension**
(613)608-8972

Fax Number
(613)608-8973

Email Address
CERTIFIER@EMAILADDRESS.COM

General | **Commodity**

[Print/Download Document \(Select to view PDF size\)](#)



Void [X]

Note: Are you sure you want to void this Summary Report submission?
Proof of Report: SUM6519WQ6776201908



“Upload Summary Report” Feature

To accommodate current SRP reporting practices, the CERS Portal has been assigned an “Upload Summary Report” feature that can be used to transfer commodity line item entries from an MS Excel file to a CERS Summary Report.

Process:

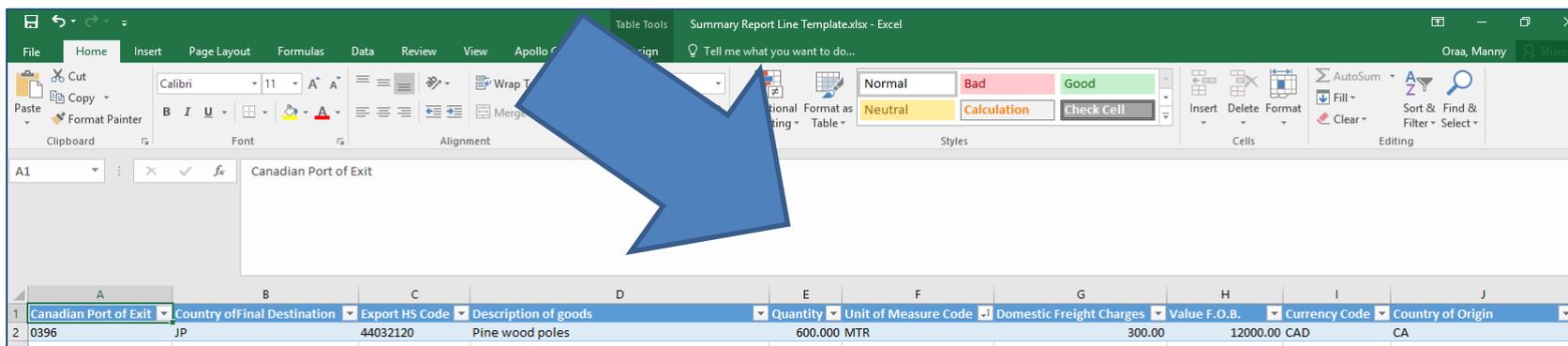
- 1) Create an SRP report that is saved to a Microsoft Excel file.
- 2) Transfer the SRP report’s Commodity Line entries to a CBSA Summary Report Line Template file (MS Excel).
- 3) Use Excel’s “Save as” feature to save the contents of the Summary Report Line Template to a new XML data file.
- 4) Within CERS, access the Create/Amend Summary Report page. Navigate to the Commodities section and click the “Upload Summary Report” – Browse button.
- 5) Select the XML data file (from Step 3).

(Screenshots provided on following pages)

“Upload Summary Report” Feature

- 1) Create an SRP report using Microsoft Excel.
- 2) Transfer the SRP report’s Commodity Lines to a CBSA Summary Report Line Template file (MS Excel).

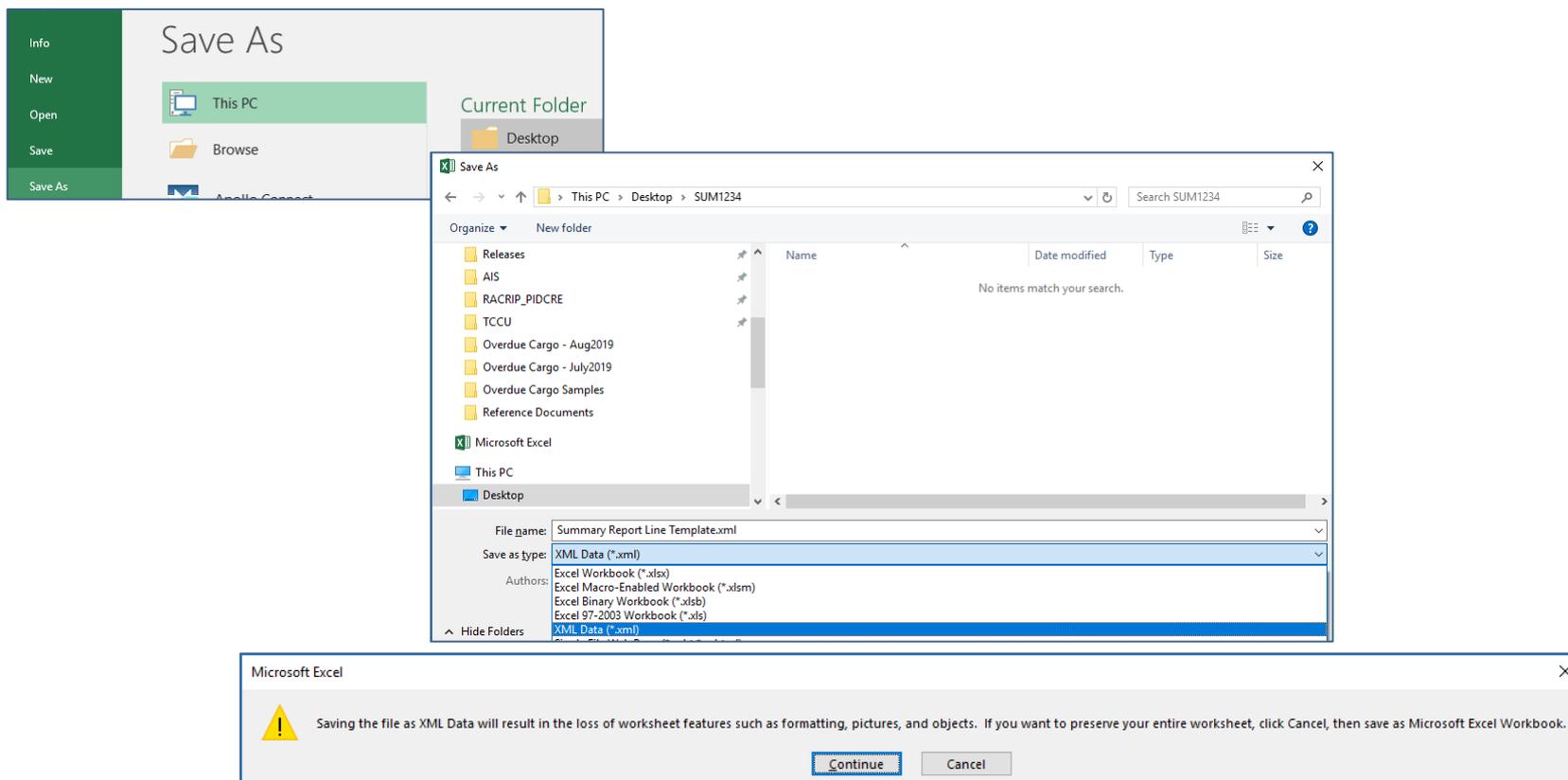
Canadian Port of Exit	Country of Final Destination	Description of Goods	HS (8) Code	Unit of Measure	Quantity	Domestic Freight Charges	Value FOB	Currency of Declared Value	Country of Origin	Province of Origin	Mode of Transport (MOT)	Vessel Name (if Marine)	Containerized (Yes/No)	Permit Number (if required)
0396	Japan	Pine wood poles	44032120	MTR	600	300	12000	CAD	CANADA	QUEBEC	MARINE	OOCL MONTREAL	NO	Permit1, Permit2





“Upload Summary Report” Feature

- 3) Use Excel’s **Save as** feature to save the contents of the Summary Report Line Template to a new XML data file.





“Upload Summary Report” Feature

- 4) Within the Create/Amend Summary Report page, access the Commodities tab and click the “Upload Summary Report” – Browse button.
- 5) Select the XML data file that was created in Step 3.

The screenshot shows the 'Create Summary Report' web application interface. The top navigation bar includes 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The main content area is titled 'Create Summary Report' and displays the following information:

- Reporter Business Number: 92240078990001
- Reporter Name: ABC Company Inc.
- Summary ID: SUM1234

All fields are mandatory unless otherwise specified.

The 'General' tab is selected, and the 'Commodity' sub-tab is active. A note states: 'Note: You may save an additional 9999 Commodity items for this Summary Report'. Below this, there are buttons for 'Add Commodity' and 'Select Summary Report Line Item Lookup'. A 'Show' dropdown is set to '10' entries, and a 'Filter' input field is present.

A table with the following columns is shown: Number, HSB Code, Quantity, UOM, Value, Edit, and Delete. The table is currently empty, with the text 'Export Document Template List is Empty' displayed below it.

At the bottom of the 'General' tab, there is an 'Upload Summary Report' section with a 'Browse...' button (circled in red) and a 'Submit' button.

The file explorer window, titled 'Choose File to Upload', is open over the 'Browse...' button. It shows the file 'Summary Report Line Template.xml' (4,170 KB) selected in the 'This PC > Desktop > SUM1234' directory. The 'Open' button (circled in red) is highlighted.



“Upload Summary Report” Feature

Result: The Commodity Line entries will be transferred from the XML file to the CERS Summary Report.

Bulletins | **Export Documents** | **Lookups** | **Templates** | **User Access**

Create Summary Report

Exporter Business Number: 123456789RM0001
Exporter Name: ABC Company Inc.
Summary ID: SUM6519

All fields are mandatory unless otherwise specified.

General | **Commodity**

Note: You may save an additional 9998 Commodity items for this Summary Report

[Add Commodity](#) or [Select Summary Report Line Item Lookup](#)

Show entries Filter

Number	HS8 Code	Quantity	UOM	Value	Edit	Delete
#001	4403.21.20	600	Metre	12000	Edit	Delete

Showing 1 to 1 of 1 entries 1



“Upload Summary Report” Feature

Once your data has been uploaded to the Summary Report, you can:

- Access the **General** tab and enter information regarding the submitter of the report
- Click the **Check for Errors** button to receive feedback regarding any business data validation errors
- Click the **Save and Continue** or **Save and Finish Later** button to save a draft copy of the Summary Report
- Click the **Submit to the CBSA** button to transmit the completed Summary Report to the CBSA

The screenshot shows the 'Create Summary Report' web application interface. At the top, there are navigation tabs: 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The main heading is 'Create Summary Report'. Below this, the following information is displayed: 'Exporter Business Number: 123456789RM0001', 'Exporter Name: ABC Company Inc.', and 'Summary ID: SUM6519'. A note states: 'All fields are mandatory unless otherwise specified.' There are two tabs: 'General' and 'Commodity'. The 'Commodity' tab is active. A note says: 'Note: You may save an additional 9998 Commodity items for this Summary Report.' Below this, there are two buttons: 'Add Commodity' and 'Select Commodity Lookup'. A 'Show' dropdown is set to '10' entries, and there is a 'Filter' input field. A table with the following data is shown:

Number	HSB Code	Quantity	UOM	Value	Edit
#001	4403.21.20	600	Metre	12000	Edit

Below the table, it says 'Commodity 1 - 1 of 1'. There is an 'Upload Summary Report' section with a 'Browse...' button and a 'Submit' button. At the bottom, there are four buttons: 'Check for Errors', 'Save and Continue', 'Save and Finish Later', and 'Submit to the CBSA'. A 'Cancel' button is also present. At the very bottom, there is a link: 'Print/Download Document (Select to view PDF size)'.



11. Using the Bulk Loads Feature

- Overview
- Using the “Bulk Upload” feature
- Bulk Upload section
- Deleting, Editing, and Submitting draft Export Declarations
- Error Report



Overview of the Bulk Upload Feature

The CERS Portal application enables users to create and submit Export Declarations to the CBSA. When using the standard creation method ("*Export Declaration*"), a user must manually enter information into an online form in order to create one new, draft Export Declaration.

Create Export Document

This screenshot shows the 'Create Export Document' selection screen. It features a navigation bar with 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. Below the navigation bar, the title 'Create Export Document' is displayed. A note states: 'Note: You have space to save 98 Draft Export Documents for this Business Account.' The main content area asks the user to 'Select the type of Export Document you want to create:' and provides a list of options: 'Export Declaration' (highlighted), 'Summary Report', 'Bulk Loads', and 'Use Document Template'. At the bottom right, there are 'Submit' and 'Cancel' buttons.

This screenshot shows the 'Create Export Declaration' form. It features a navigation bar with 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. Below the navigation bar, the title 'Create Export Declaration' is displayed. The form contains the following information: 'Exporter Business Number: 123456789RM0001', 'Exporter Name: ABC Company Inc.', and a note: 'All fields are mandatory unless otherwise specified.' The form is divided into sections: 'Exporter', 'Consignee', 'Service Provider', 'Certifier', 'Commodity', 'Other Export Details', and 'Customs Details'. The 'Exporter' section includes fields for 'Business Number' (129260675RM0009) and 'Authorized ID' (WQ6776). There is a 'Lookup Name' field with a 'Select a Lookup' button. Below this, there is a 'Mandatory if creating a lookup' label and a radio button question 'Are parties related?' with 'Yes' and 'No' options. At the bottom, there is an 'Exporter Name' field.



Using the Bulk Upload Feature

- 1) Prepare a “Bulk Load” text file containing one or more draft Export Declaration records.

Note: The CBSA has produced a technical guide (ECCRD Chapter 25 (CERS Portal)) containing specifications regarding how to assign Export Declaration records to a “Bulk Load” text file.

Appendix E – Bulk Load – File Structure and Record Layout

File Structure:

1.1.1.1 Header record layout

Field Number	Starting Position	End Position	Fieldname	Entry Length	Data Type	Reporting Condition	Formatting Requirements
1	1	1	Record type	1	Code	Mandatory	H
2	2	7	<Not used>	6		N/A	
3	8	13	Exporter authorization ID	6	ID	Mandatory	Specify the Authorization ID of the associated exporter (Format: ZZ9999)
4-5-6	14	17	Related party Indicator	4	Code	Mandatory	Y or N

```

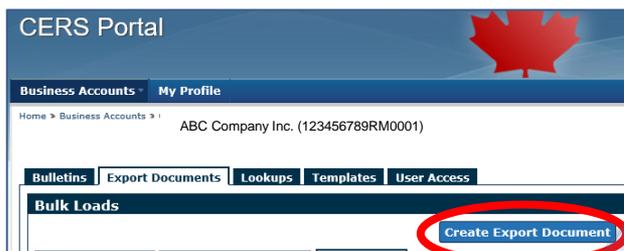
Exporter Company - Bulk Load File.txt - Notepad
File Edit Format View Help
H      WQ6776N  FORMKEY1  EXPORTER NAME XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX78129
      K2P0X5      613952036956786139529876CERTIFIER COMPANY NAME XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
DCA      ON      44031110  PRODUCT DESCRIPTION XXXXXXXXXXXXXXXXXXXXXXX
DCA      ON      44031110  PRODUCT DESCRIPTION XXXXXXXXXXXXXXXXXXXXXXX
DCA      ON      44031110  PRODUCT DESCRIPTION XXXXXXXXXXXXXXXXXXXXXXX
PPERMITNUMBER1
CTESX1
RREFERENCENUMBER1
H      WQ6776N  FORMKEY2  EXPORTER NAME XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX78129
      K2P0X5      613952036956786139529876CERTIFIER COMPANY NAME XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
DCA      ON      44031110  PRODUCT DESCRIPTION XXXXXXXXXXXXXXXXXXXXXXX
DCA      ON      44031110  PRODUCT DESCRIPTION XXXXXXXXXXXXXXXXXXXXXXX
DCA      ON      44031110  PRODUCT DESCRIPTION XXXXXXXXXXXXXXXXXXXXXXX
H      WQ6776N  FORMKEY3  EXPORTER NAME XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX78129
      K2P0X5      613952036956786139529876CERTIFIER COMPANY NAME XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
DCA      ON      44031110  PRODUCT DESCRIPTION XXXXXXXXXXXXXXXXXXXXXXX
DCA      ON      44031110  PRODUCT DESCRIPTION XXXXXXXXXXXXXXXXXXXXXXX
DCA      ON      44031110  PRODUCT DESCRIPTION XXXXXXXXXXXXXXXXXXXXXXX

```



Using the Bulk Upload Feature

- 2) Upload the contents of the “Bulk Load” text file to the CERS Portal Business Account.





Using the Bulk Upload Feature

Result: CERS will extract information from the “Bulk Load” file and will use it to create one or more new, draft Export Declarations. These draft documents will be assigned to the Export Documents - **Bulk Upload** section.

Bulletins | **Export Documents** | **Lookups** | **Templates** | **User Access**

Bulk Loads

[Create Export Document](#)

Draft Documents | **Submitted Documents** | **Bulk Upload**

Note: You may save an additional 197 Bulk Load Export Declarations for this Business Account

Show entries Filter

<input type="checkbox"/>	Form Key	Exportation Date	Business Number	Upload Date/Time	Validation Status
<input type="checkbox"/>	FORMKEY1	2019-09-04	129260675RM0009	2019-09-04 11:57	
<input type="checkbox"/>	FORMKEY2	2019-09-04	129260675RM0009	2019-09-04 11:57	
<input type="checkbox"/>	FORMKEY3	2019-09-04	129260675RM0009	2019-09-04 11:57	

Showing 1 to 3 of 3 entries 1

[Submit Selected](#) [Delete Selected](#)



Bulk Upload Tab: Deleting Draft Export Declarations

A user can select one or more draft Export Declaration entries then click the **“Deleted Selected”** button to have these entries removed from the Bulk Upload section.

BEFORE

Business Accounts - My Profile
Home > Business Accounts > CARGILL LTD (CLAVET SASKATCHEWAN) (129260675RM0009) John Smith URN: MO547939
CERS Portal Help and Support | Log out

Bulletins | Export Documents | Lookups | Templates | User Access

Bulk Loads Create Export Document

Draft Documents | Submitted Documents | Bulk Upload

Note: You may save an additional 197 Bulk Load Export Declarations for this Business Account

Show 10 entries

<input type="checkbox"/>	Form Key	Exportation Date	Business Number	Upload Date/Time
<input type="checkbox"/>	FORMKEY1	2019-09-04	129260675RM0009	2019-09-04 11:57
<input type="checkbox"/>	FORMKEY2	2019-09-04	129260675RM0009	2019-09-04 11:57
<input checked="" type="checkbox"/>	FORMKEY3	2019-09-04	129260675RM0009	2019-09-04 11:57

Showing 1 to 3 of 3 entries 1 row selected

Submit Selected **Delete Selected**

AFTER

Business Accounts - My Profile
Home > Business Accounts > CARGILL LTD (CLAVET SASKATCHEWAN) (129260675RM0009)

Bulletins | Export Documents | Lookups | Templates | User Access

Bulk Loads Create Export Document

Draft Documents | Submitted Documents | Bulk Upload

Note: You may save an additional 198 Bulk Load Export Declarations for this Business Account

Show 10 entries

<input type="checkbox"/>	Form Key	Exportation Date	Business Number	Upload Date/Time
<input type="checkbox"/>	FORMKEY1	2019-09-04	129260675RM0009	2019-09-04 11:57
<input type="checkbox"/>	FORMKEY2	2019-09-04	129260675RM0009	2019-09-04 11:57

Showing 1 to 2 of 2 entries

Submit Selected Delete Selected



Bulk Upload Tab: Submitting Draft Export Declarations

A user can select one or more draft Export Declaration entries then click the **“Submit Selected”** button to submit these declarations to the CBSA.

The screenshot shows the 'Bulk Upload' tab in the CBSA system. At the top, there are navigation tabs: 'Business Accounts', 'My Profile', 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. Below these is the 'Bulk Loads' section with a 'Create Export Document' button. The 'Draft Documents' sub-tab is active, showing a note: 'Note: You may save an additional 198 Bulk Load Export Declarations for this Business Account'. A table lists two draft documents:

<input type="checkbox"/>	Form Key	Exportation Date	Business Number	Upload Date/Time	Validation Status
<input checked="" type="checkbox"/>	FORMKEY1	2019-09-04	129260675RM0009	2019-09-04 11:57	
<input type="checkbox"/>	FORMKEY2	2019-09-04	129260675RM0009	2019-09-04 11:57	

Below the table, it says 'Showing 1 to 2 of 2 entries 1 row selected'. At the bottom of the table area, there are two buttons: 'Submit Selected' (circled in red) and 'Delete Selected'.

The dialog box titled 'Submitting Bulk Data' shows two progress bars, both at 100% Complete. The first bar is for 'Validating Documents' and the second is for 'Submitting Documents'. An 'OK' button is located at the bottom right of the dialog.



Bulk Upload Tab: Submitting Draft Export Documents

After submitting one or more draft Export Declarations to the CBSA, the user can choose to print out a confirmation report (containing a list of the associated Proof of Report Numbers).

The screenshot shows a web application interface with a navigation bar at the top containing 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. The main content area is titled 'Bulk Loads' and has a sub-tab 'Bulk Upload' selected. A 'Create Export Document' button is visible. The main text area contains the following information:

The following documents were successfully submitted:
FORMKEY1, WQ6776201909042308

Document(s) which are successfully submitted will be removed from this list and will appear on corresponding Submitted Documents lists.

At the bottom of this section, there are two buttons: 'Print/Download Report' (circled in red) and 'Close'.

Below the main content area, a file download dialog is open, asking: 'Do you want to open or save BulkLoadSubmissionReport.pdf (558 KB) from apps-ho1.cbsa-asfc.gc.ca?'. The dialog has 'Open', 'Save', and 'Cancel' buttons.

Bulk Load Documents Submission Report / Rapport de soumission du chargement en vrac

Your Bulk Upload has been submitted to the CBSA. / Votre téléchargement en vrac a été soumis à l'ASFC.

Form Key / Clé de formulaire	Proof of Report / Preuve de déclaration
FORMKEY1	WQ6776201909042308



Bulk Upload Tab: Editing a Draft Export Document

Within the Bulk Upload section, a user can click a **Form Key** link in order to view and edit the contents of a draft Export Declaration.

The screenshot displays the 'Bulk Upload' section of a web application. At the top, there are navigation tabs: 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. Below these is a 'Bulk Loads' header with a 'Create Export Document' button. The main area has sub-tabs for 'Draft Documents', 'Submitted Documents', and 'Bulk Upload'. A note states: 'Note: You may save an additional 199 Bulk Load Export Declarations for this Business Account'. There is a 'Show 10 entries' dropdown and a 'Filter' input field. A table lists draft documents with columns: 'Form Key', 'Exportation Date', 'Business Number', 'Upload Date/Time', and 'Validation Status'. The first entry has 'FORMKEY2' circled in red. Below the table are 'Submit Selected' and 'Delete Selected' buttons. A modal window titled 'Create Export Declaration' is open, showing 'Exporter Business Number: 123456789RM0001' and 'Exporter Name: ABC Company Inc.'. It includes tabs for 'Exporter', 'Consignee', 'Service Provider', 'Certifier', 'Commodity', 'Other Export Details', and 'Customs Details'. The 'Exporter' tab is active, showing 'Business Number' (129260675RM0009) and 'Authorized ID' (WQ6776). A question 'Are parties related?' has 'No' selected. At the bottom of the modal are buttons: 'Check for Errors', 'Save and Exit', 'Submit to the CBSA', and 'Cancel'.

<input type="checkbox"/>	Form Key	Exportation Date	Business Number	Upload Date/Time	Validation Status
<input type="checkbox"/>	FORMKEY2	2019-09-04	129260675RM0009	2019-09-04 11:57	

Showing 1 to 1 of 1 entries

Submit Selected Delete Selected

Create Export Declaration

Exporter Business Number: 123456789RM0001
Exporter Name: ABC Company Inc.

All fields are mandatory unless otherwise specified.

Exporter | Consignee | Service Provider | Certifier | Commodity | Other Export Details | Customs Details

Business Number: 129260675RM0009 Authorized ID: WQ6776

Are parties related? Yes No

Check for Errors Save and Exit Submit to the CBSA Cancel



Bulk Upload: Error Report

When this event occurs, CERS will abort the Bulk Upload operation and generate an **Error Report** that identifies the issue(s) found in the Bulk Load text file.

Create Export Document

Select A File To Upload:

Please fix the error(s) and upload the file again:

[Print/Download Error Report](#)

Do you want to open or save **ErrorReport.pdf** (895 KB) from **apps-ho1.cbsa-asfc.gc.ca**?

Form Key / Clé de formulaire		Line No No de ligne	Field No No du champ	Field Name/Nom du champ	Rec Type /Type d'enregist rement	Error Message / Message d'erreur	Data/Données	Data size /Taille des données	Max size /Taille Maximale
FORMKEY1	1	4	Province of Origin Code	D	Code value not valid	ZZ	2	2	



13. One Time Submission

A “One Time” Export Declaration submission is nearly identical to a standard Export Declaration submission, except for the following:

- For a standard Export Declaration submission, the reporter must specify the Exporter Business Number and Exporter Authorization ID that belongs to the associated exporter company.
- For a “One Time” Export Declaration submission, the Customs Service Provider (CSP) can report on behalf of an individual or company that does not possess an Exporter Business Number. The “One Time” Export Declaration submission will be assigned the CSP’s Exporter Business Number and a special Exporter Authorization ID issued to the CSP for use with “One Time” submissions.



13. One Time Submission

Note: A “One Time” submission is not to be completed for an individual or company that has exported commercial goods from Canada on several occasions. Such companies are required to obtain their own Exporter Business Number (i.e. CRA Business Number and RM exporter program account) from the Canada Revenue Agency for the purposes of declaring their commercial exports to the CBSA.



13. One Time Submission

To create a “One Time” submission:

1. Access a CERS Business Account (belonging to a CSP).
2. Access the Export Documents tab, then click the Create Export Document button.
3. Within the Create Export Document page, select option “**One Time Submission**” then click Submit.

Bulletins | **Export Documents** | **Lookups** | **Templates** | **User Access**

Create Export Document

Note: You have space to save 95 Draft Export Documents for this Business Account.

Select the type of Export Document you want to create:

- Export Declaration
- Summary Report
- Bulk Loads
- One Time Submission**
- Use Document Template

Submit Cancel



13. One Time Submission

CERS Portal will display the Create Export Declaration page, which has automatically been assigned an Exporter Business Number and Exporter Authorization ID entry.

This “One Time” submission can be treated like any other draft export document.

- Available program options: Check for Errors; Save and Continue; Save (as draft) and Finish Later; Submit to the CBSA; Cancel.

The screenshot shows the 'Create Export Declaration' form in the CERS Portal. The form is titled 'Create Export Declaration' and has a navigation bar with tabs: 'Bulletins', 'Export Documents', 'Lookups', 'Templates', and 'User Access'. Below the title, the form displays the following information:

Exporter Name: ABC Service Provider
Exporter Business Number: 123456789RM0001

All fields are mandatory unless otherwise specified.

The form has a main navigation bar with tabs: 'Exporter', 'Consignee', 'Service Provider', 'Certifier', 'Commodity', 'Other Export Details', and 'Customs Details'. The 'Exporter' tab is active.

The form contains the following fields:

- Business Number:** 123456789RM0001
- Authorization ID:** ZZ2544
- Lookup Name:** (empty field) with a 'Select a Lookup' button. A note below states: 'Mandatory if creating a lookup'.
- Are parties related?:** Radio buttons for 'Yes' and 'No'.
- Exporter Name:** (empty field)
- Street Address:** (empty field)
- City:** (empty field)
- Country:** Dropdown menu with 'Select Country --' and a downward arrow.
- Province/State:** Dropdown menu with 'Select Province/State --' and a downward arrow.

At the bottom of the form, there is a navigation bar with tabs: 'Exporter', 'Consignee', 'Service Provider', 'Certifier', 'Commodity', 'Other Export Details', and 'Customs Details'. Below the tabs, there is a note: 'Complete all mandatory fields within the tabs above.' and a set of buttons: 'Check for Errors', 'Save and Continue', 'Save and Finish Later', 'Submit to the CBSA', and 'Cancel'.



14. Helpful Links

- Electronic Commerce Client Requirements Document (ECCRD) - Chapter 25 for additional information regarding the CERS Portal: https://www.cbsa-asfc.gc.ca/eservices/eccrd-eng.html#_s1-25
- Refer to <https://www.cbsa-asfc.gc.ca/prog/cers-scde/menu-eng.html> for further information on CERS Portal.
- General e-mail enquiries can be sent to CBSA.CERS_Inquiries-Renseignements_SCDE.ASFC@cbsa-asfc.gc.ca
- SecureKey Concierge FAQs: <https://www.canada.ca/en/revenue-agency/services/e-services/cra-login-services/sign-partners-help-faqs/using-a-sign-partner.html>
- Government of Canada GCKey FAQs: <https://www.canada.ca/en/revenue-agency/services/e-services/cra-login-services/sign-partners-help-faqs/general-secure-key-faqs.html>
- HS Code Information: <https://www150.statcan.gc.ca/n1/en/catalogue/65-209-X>



END